FOR CONSULTANTS AND PRINCIPALS

The broker desk — a walkthrough

Your book, your renewals, your requests — and the record your clients read from the other side.

dashboard

/broker — The dashboard for the book assigned to you: clients, premium, renewals due, requests open. A consultant sees only their assigned clients. An empty desk is the boundary working.

requests

/broker/requests — What your clients have asked for, and what you have replied. Answering here puts the reply in the client's own record, so nobody has to be briefed later.

membership

/broker/members — Membership across your clients — joiners, leavers, who is waiting. Use it to spot a roster drifting from the policy headcount before renewal does it for you.

claims

/broker/claims — Claims oversight across the book, as aggregates. No claimant is ever named. For spotting a client whose experience is worsening, not for looking anybody up.

clients

/broker/clients — Every client on your desk, with lives, premium and renewal date. Open a client for their full record.

renewals

/broker/renewals — The pipeline, soonest first, with at-risk and attention marked. Clients with no renewal date on file are listed rather than hidden — those are the ones to chase.

who covers what

/broker/team — Who covers what, and what members are told to call. The support details reach every member of every client you cover. A monitored mailbox, not an individual.

commission & fees

/broker/commission — Commission earned to date and the premium it sits on, with concentration across the book. Per-client rates are not restated here — they are disclosed to the client on their own account, one number in one place.

recent activity

/broker/activity — Everything that has happened on the desk, and the messages you have sent to members. Write to members here. The client picker is your assigned book and is re-checked against the database.