

UNDERSTANDING

University Learning Checklist

Use this checklist to track your progress through the University Learning Modules. Check off each item as you complete it. The full program should take approximately 1-2 hours.

- ☐ 1. Welcome (Click Here First)
 - ☐ Who is AgencyKPI?
 - ☐ Where in the world are we?
 - ☐ How should I use this University section?
- ☐ 2. Setup Steps
 - ☐ Create your password
 - ☐ Watch for our email "Welcome to AgencyKPI"
 - ☐ Understanding Link
 - ☐ Manage Your Team
 - ☐ Prepare reports within your Agency Management System
 - ☐ Report Instructions
 - ☐ Time Frame Calculator
 - ☐ Consistency is Key
 - ☐ Uploading 101
 - ☐ Test your Knowledge of Uploading
 - ☐ Need Assistance before moving on?
- ☐ 3. Get to know Understanding
 - ☐ Carrier Production
 - ☐ Test your Knowledge of Carrier Production
 - ☐ Agency Production
 - ☐ Test your Knowledge of Agency Production
 - ☐ Performance Charts & Graphs
 - ☐ Market Assistance
 - ☐ Test your Knowledge of Market Assistance
 - ☐ Revenue Tuner
 - ☐ Test your Knowledge of Revenue Tuner
 - ☐ Clarity (NAICS Coding)
 - ☐ Test your Knowledge of Clarity
- ☐ 4. Just a few more clicks!
 - ☐ Request a meeting with customer support (if needed)
 - ☐ Congratulations! That's it! Feel free to reach out to us anytime if you need assistance or have any questions in the future.
- ☐ Answers
 - ☐ Test your Knowledge of Uploading
 - ☐ Test your Knowledge of Carrier Production
 - ☐ Test your Knowledge of Agency Production
 - ☐ Test your Knowledge of Market Assistance
 - ☐ Test your Knowledge of Revenue Tuner
 - ☐ Test your Knowledge of Clarity