

Marketing Dashboard - Scorecard Overview

Filter by Date Range

Key Success Benchmarks (insurance industry specific): Email Open Rate: 22% | Email Click-to-Open Rate: 4% | LinkedIn Engagement Rate: 1.8%

1/1/2017

12/31/2026

CRM Overview

Revenue Won
\$20.3M

Active Pipeline Value
\$40.6M

Total Active Deals
168

LinkedIn Overview

Avg Engagement Rate
17.83%

16.08%
+/- Industry Avg

Avg LinkedIn Click Rate
13.05%

12.49%
+/- Industry Avg

Avg Reactions
32

Avg Comments
5

Avg Reposts
3

Avg Impressions (Organic)
889

Follower Count
1,266

Unique Visitors
626

Follower Growth Rate
6.75%

Email Overview

Avg Open Rate
35.35%

13.35%
+/- Industry Avg

Avg Click-To-Open Rate
20.40%

16.30%
+/- Industry Avg

Avg Click Rate
8.39%

7.04%
+/- Industry Avg

Avg Unsubscribe Rate
0.18%

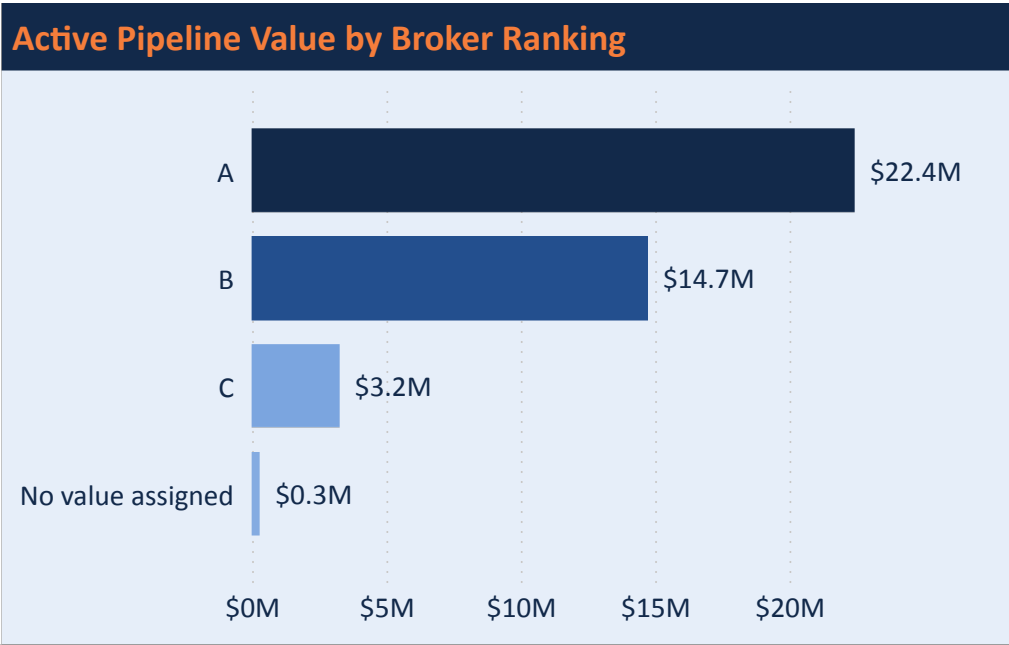
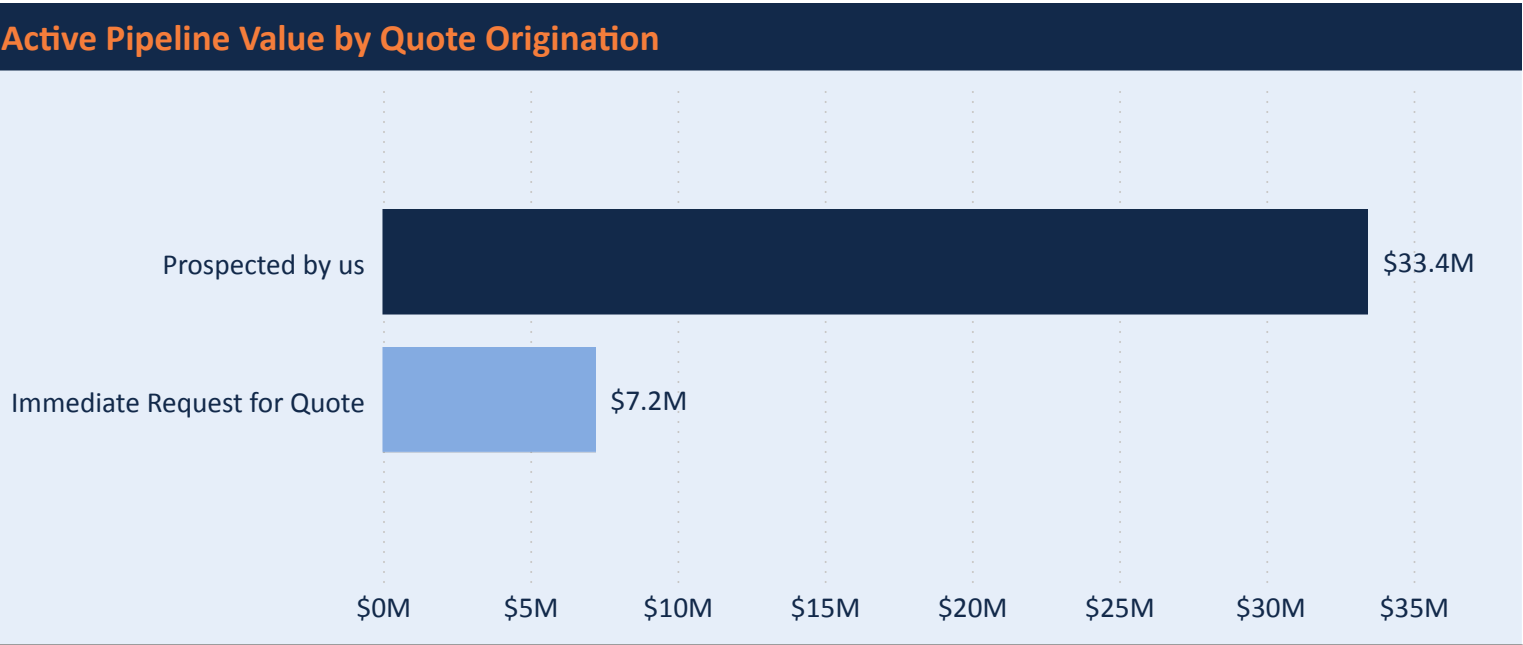
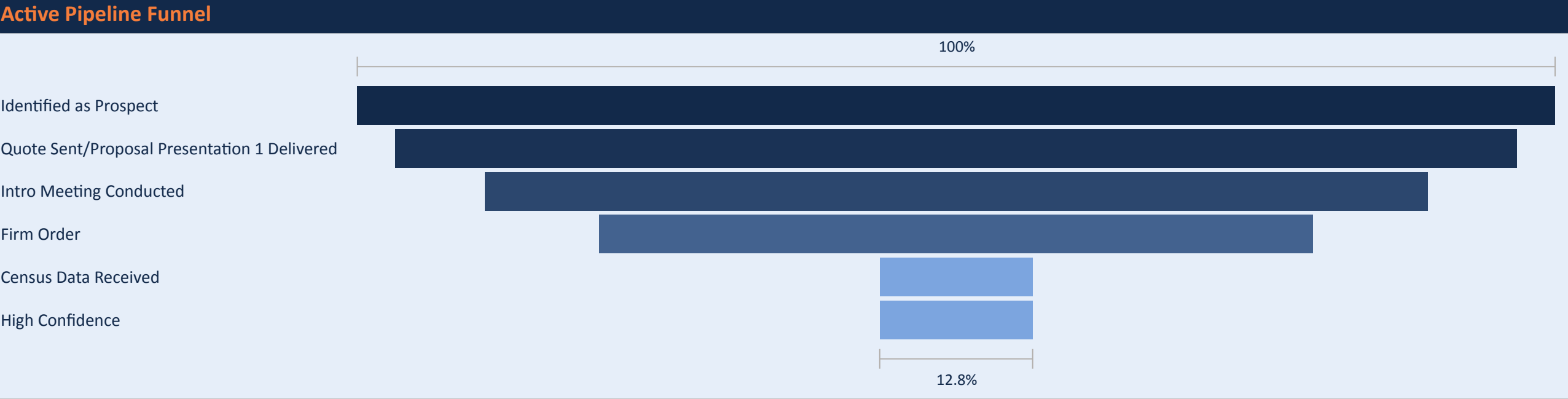
0.08%
+/- Industry Avg

Avg Bounce Rate
1.40%

0.40%
+/- Industry Avg

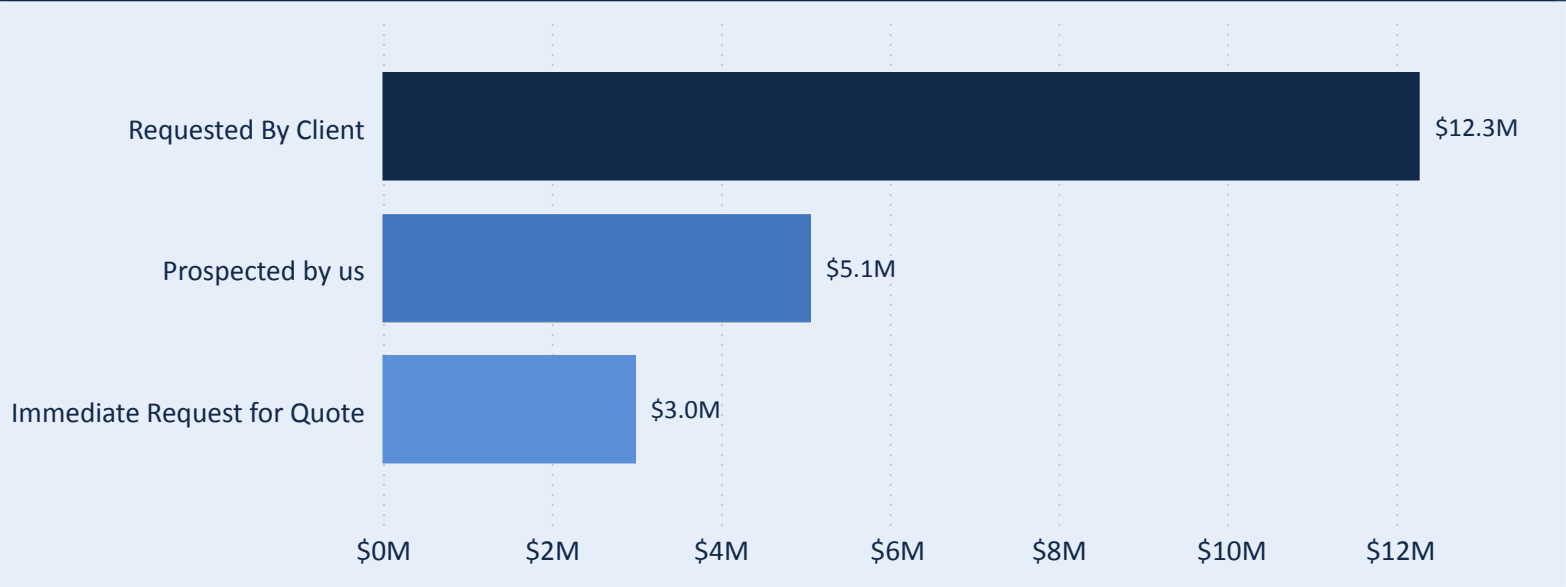
Total Successful Deliveries
23.9K

CRM Active Pipeline Analysis

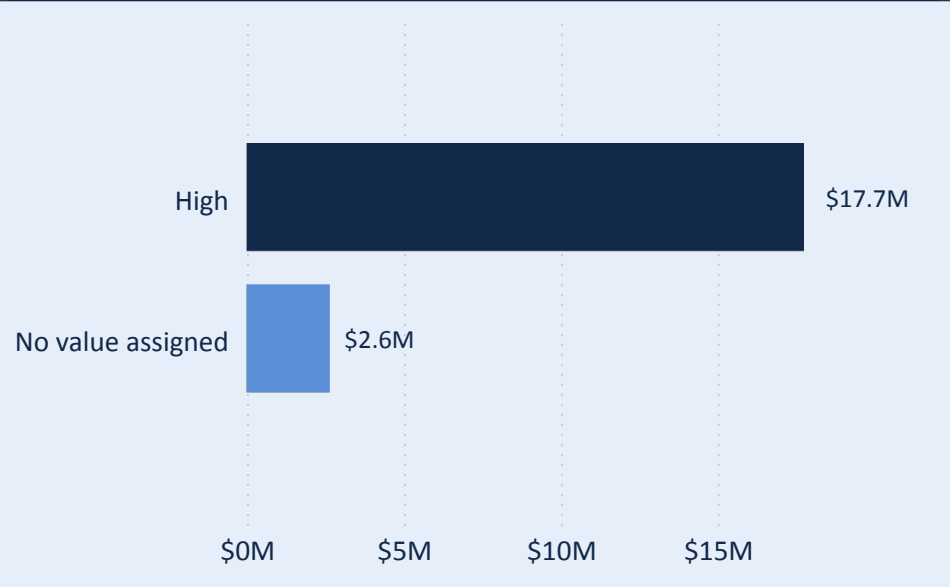


CRM Revenue Analysis

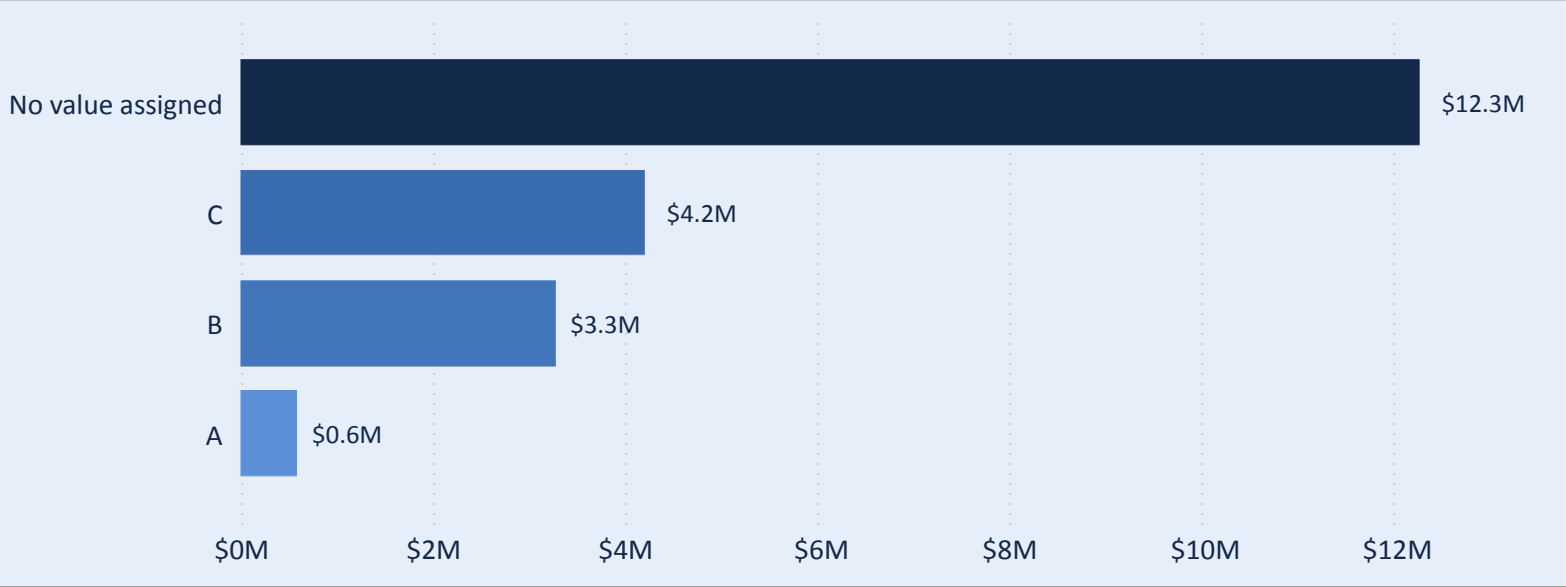
Revenue Won by Quote Origination



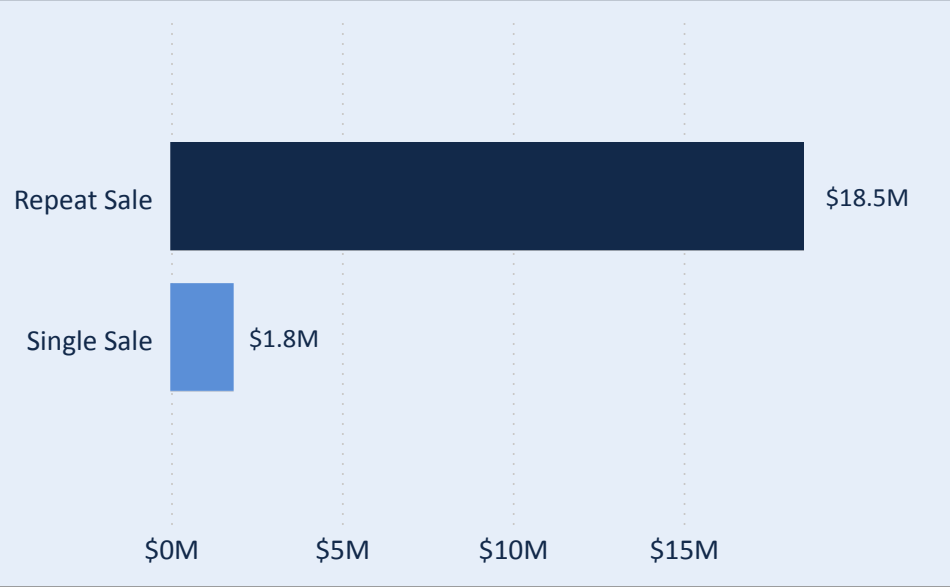
Revenue Won by Priority



Revenue Won by Broker Ranking

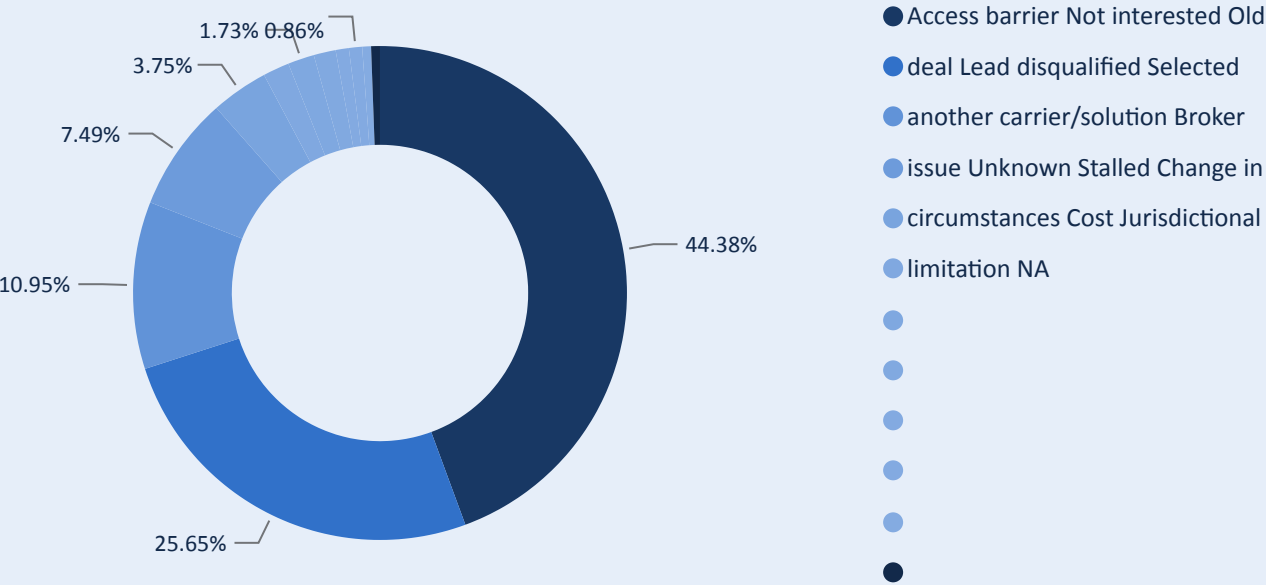


Revenue Won by Lifecycle Stage

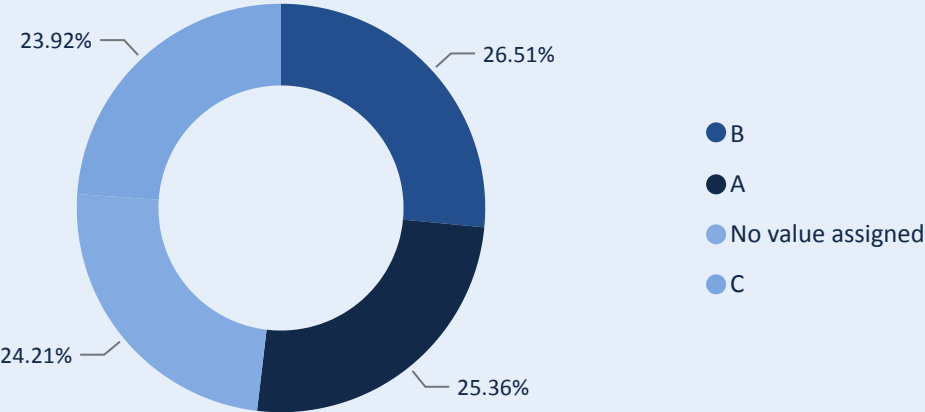


CRM Deal Loss Analysis

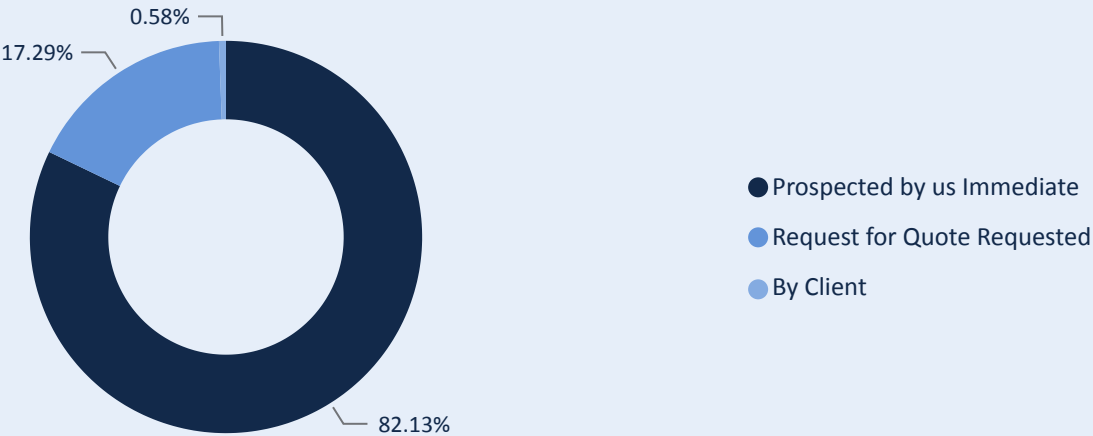
Total Lost Deals by Closed Lost Reason



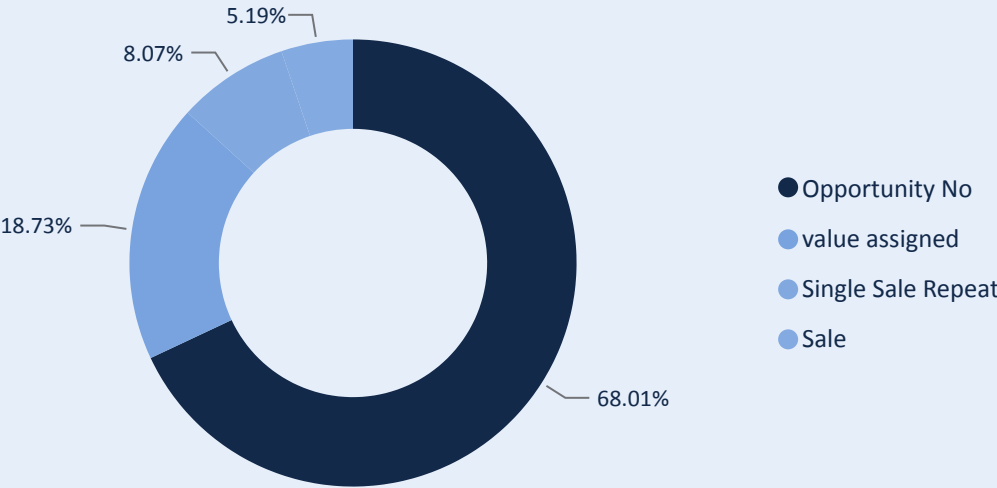
Total Lost Deals by Broker Ranking



Total Lost Deals by Quote Origination

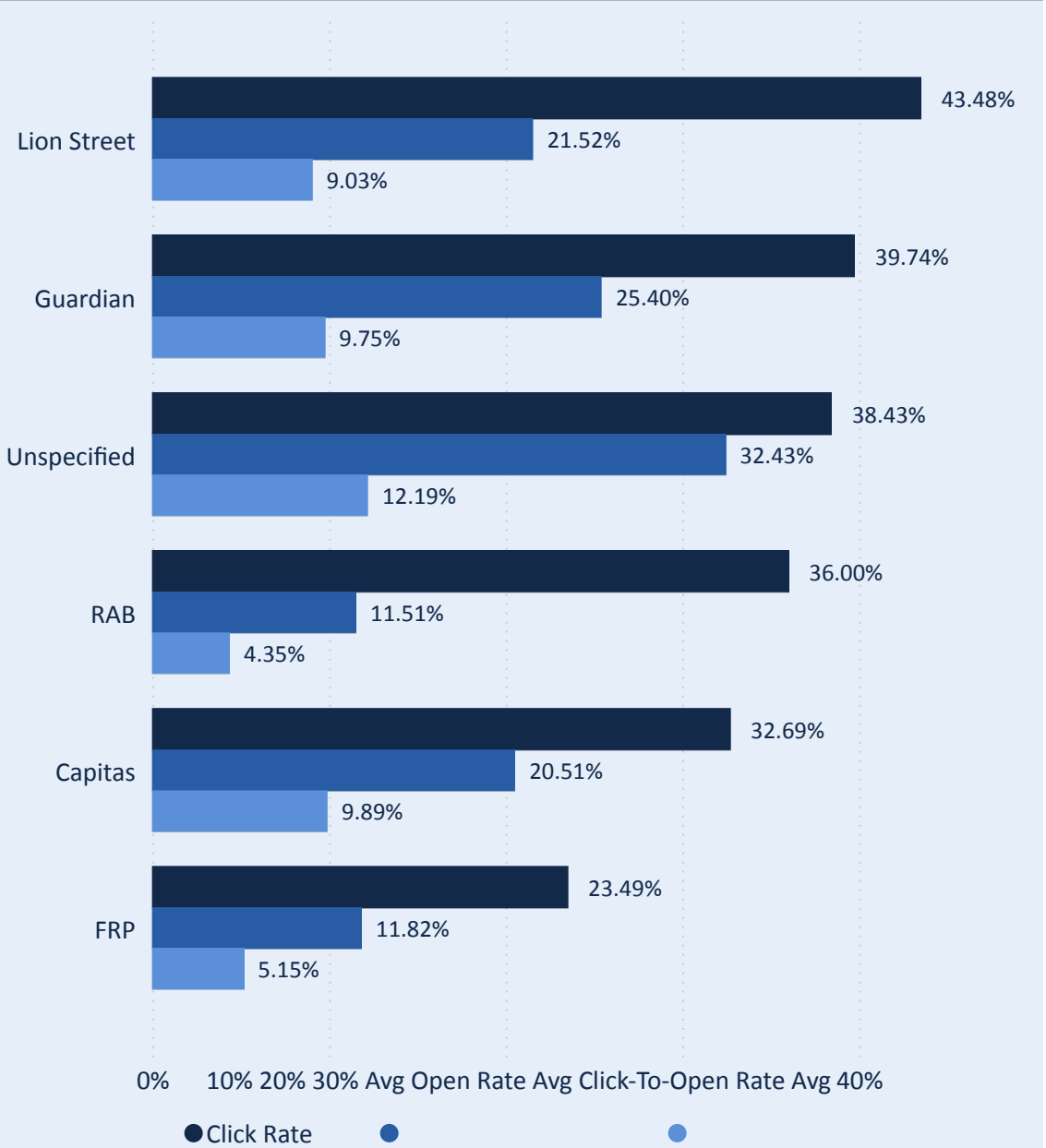


Total Lost Deals by Lifecycle Stage

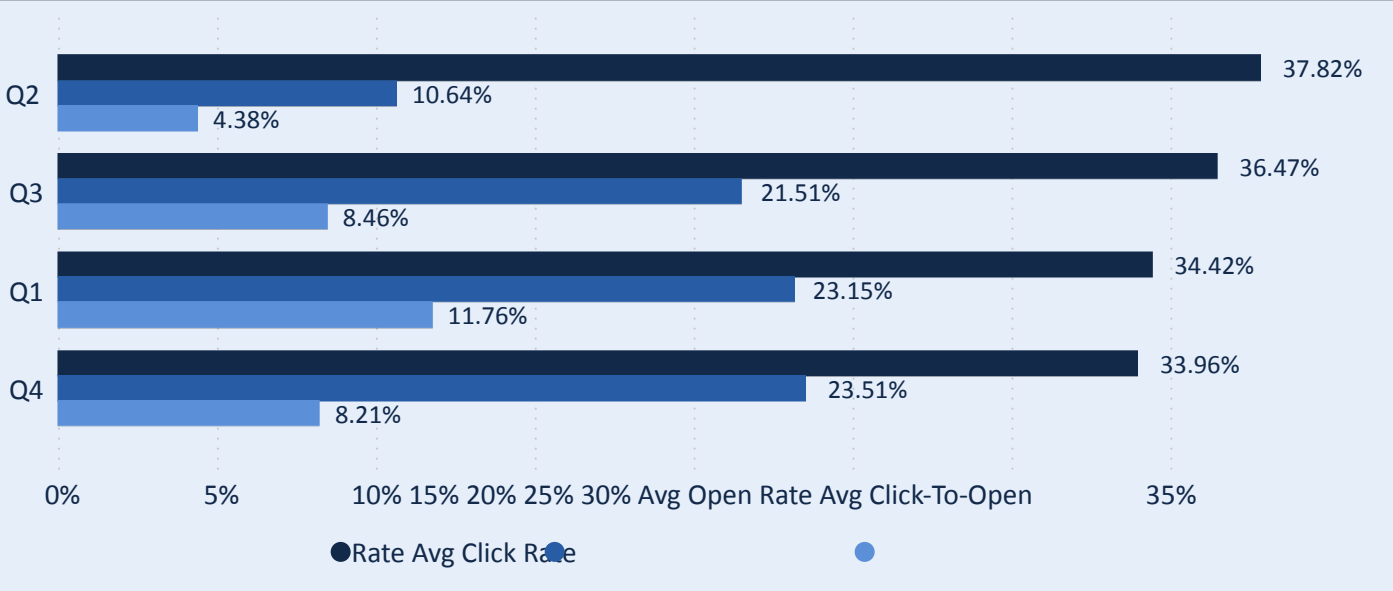


Email Engagement Analysis

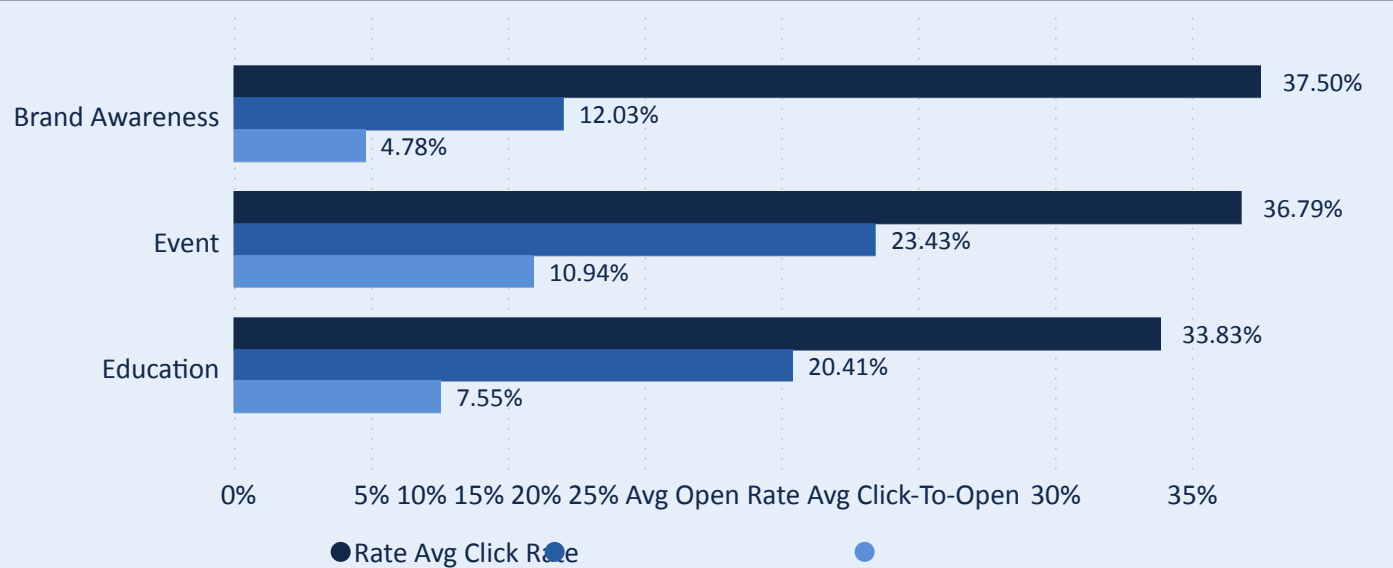
Email Engagement by Audience Segment



Email Engagement by Quarter

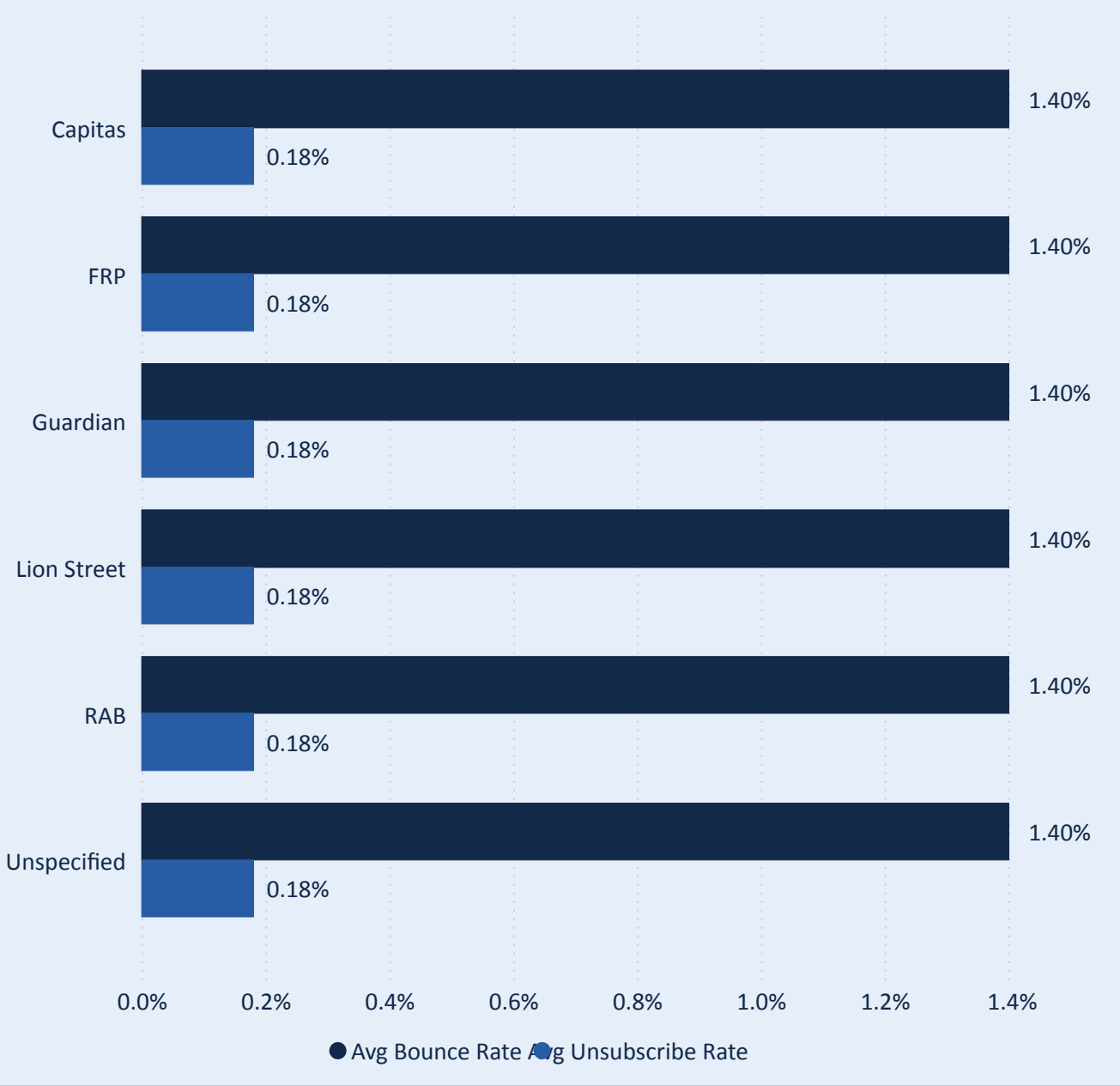


Email Engagement by Campaign Goal

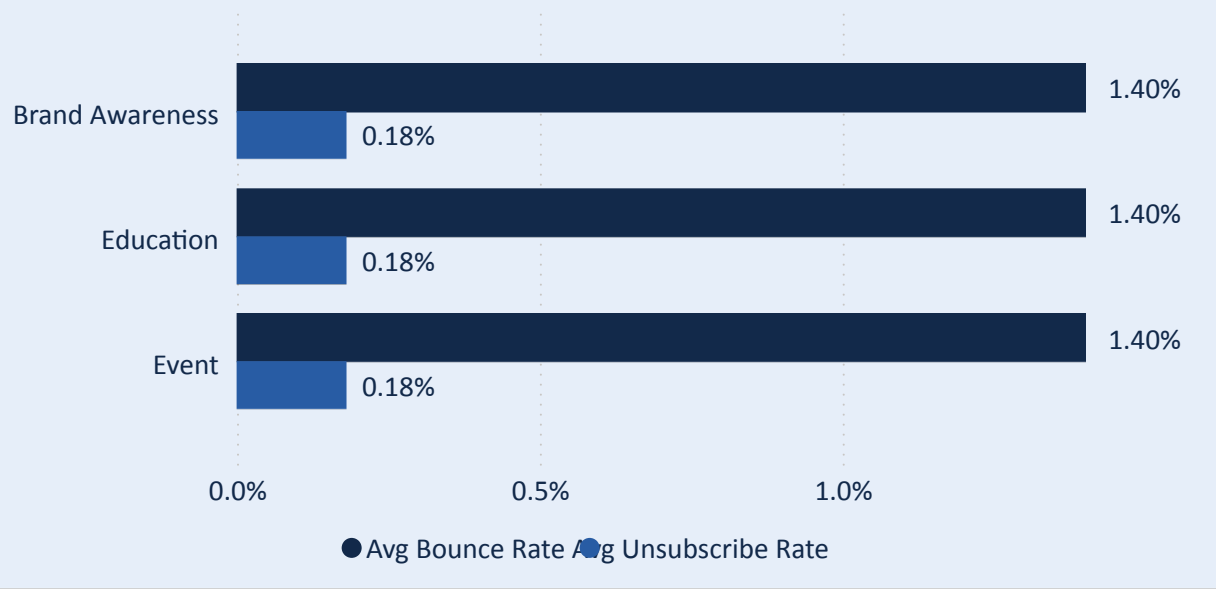


Email Disengagement Analysis

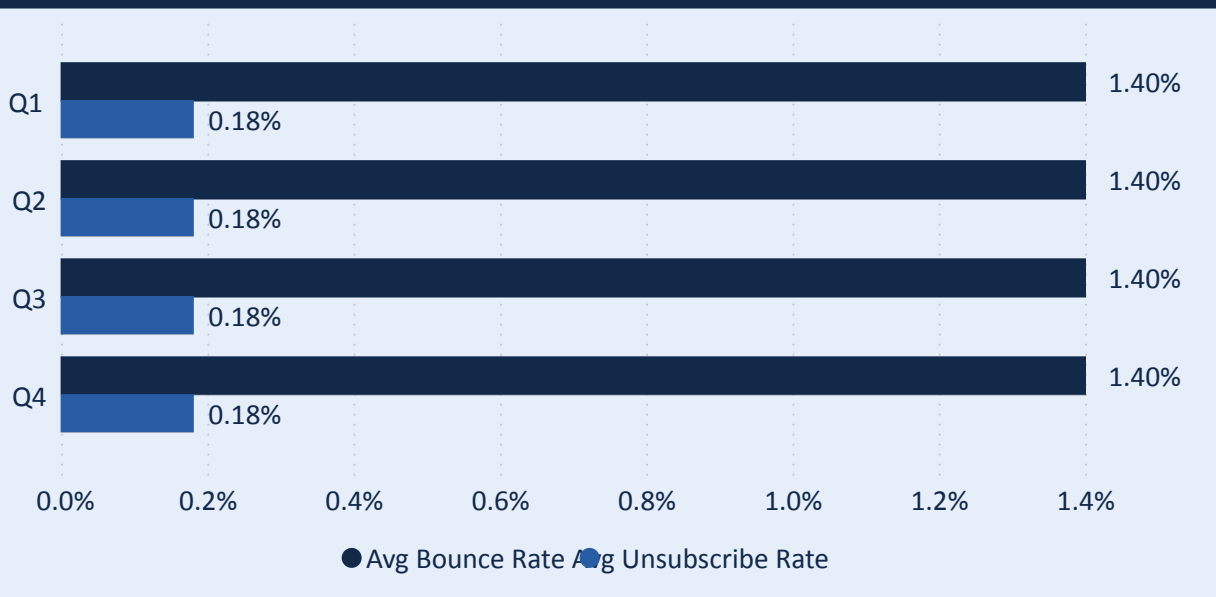
Email Disengagement by Audience Segment



Email Disengagement by Campaign Goal

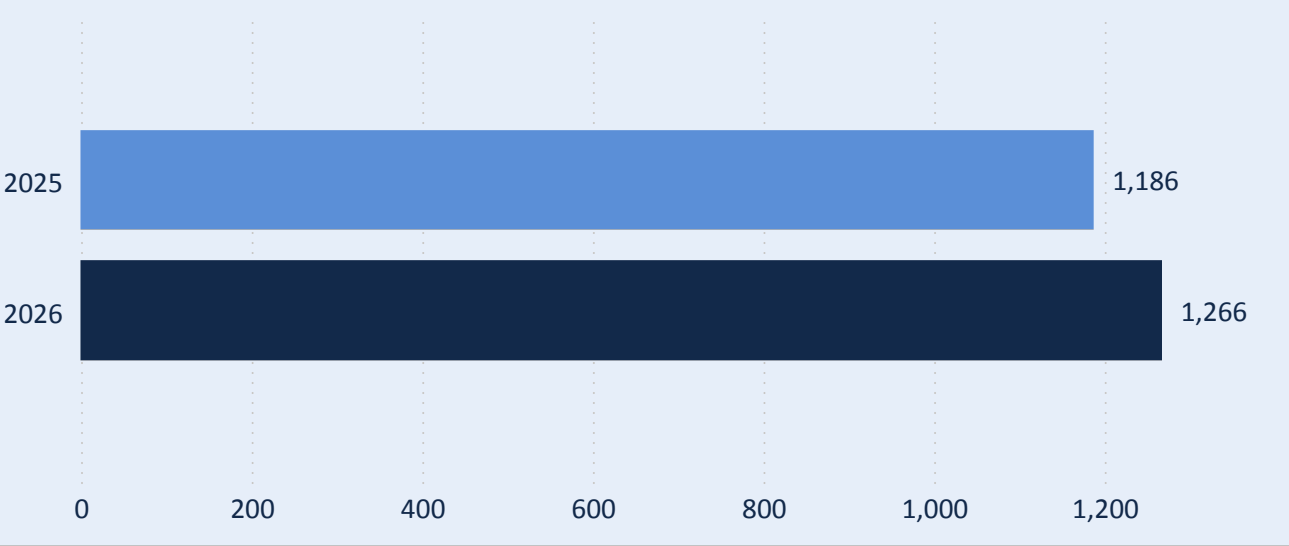


Email Disengagement by Quarter

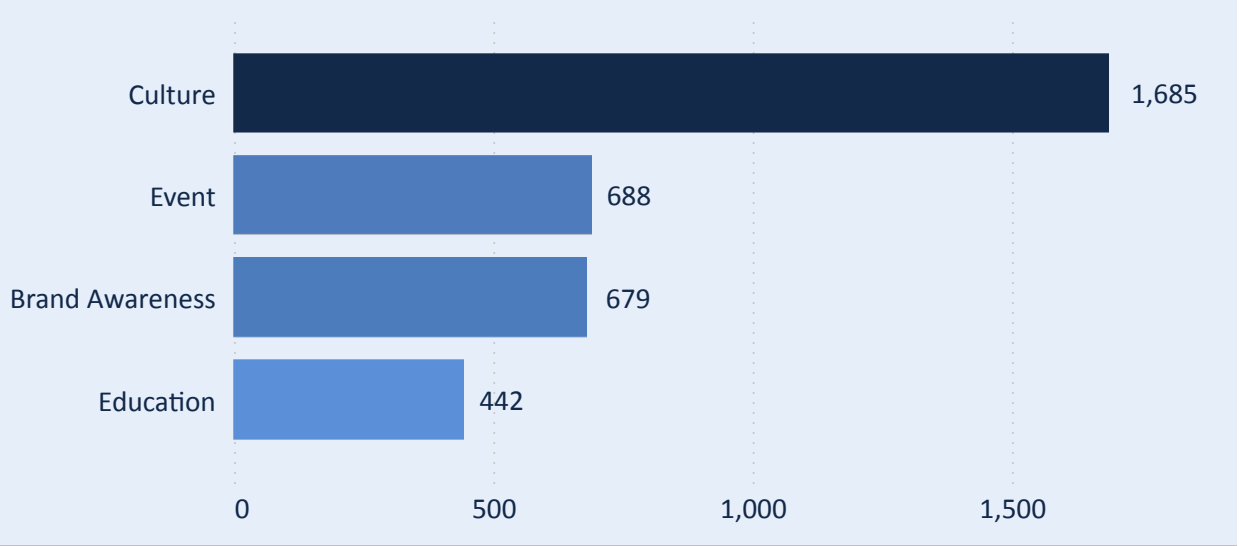


LinkedIn Reach Analysis

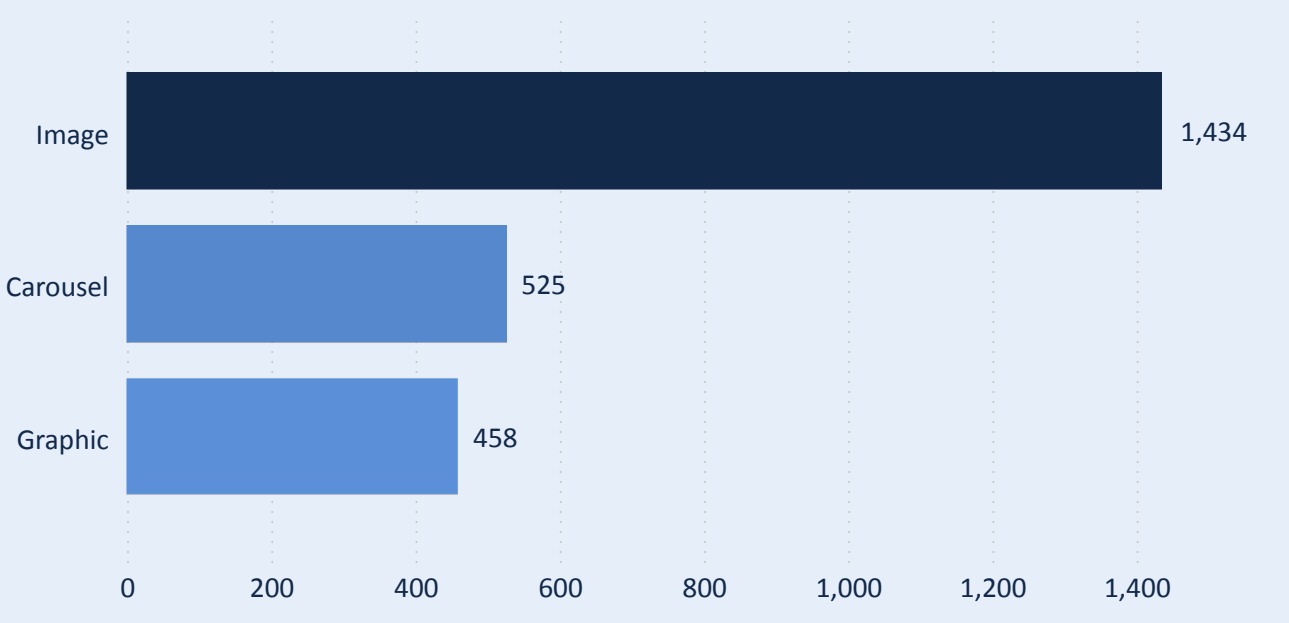
Follower Count by Year



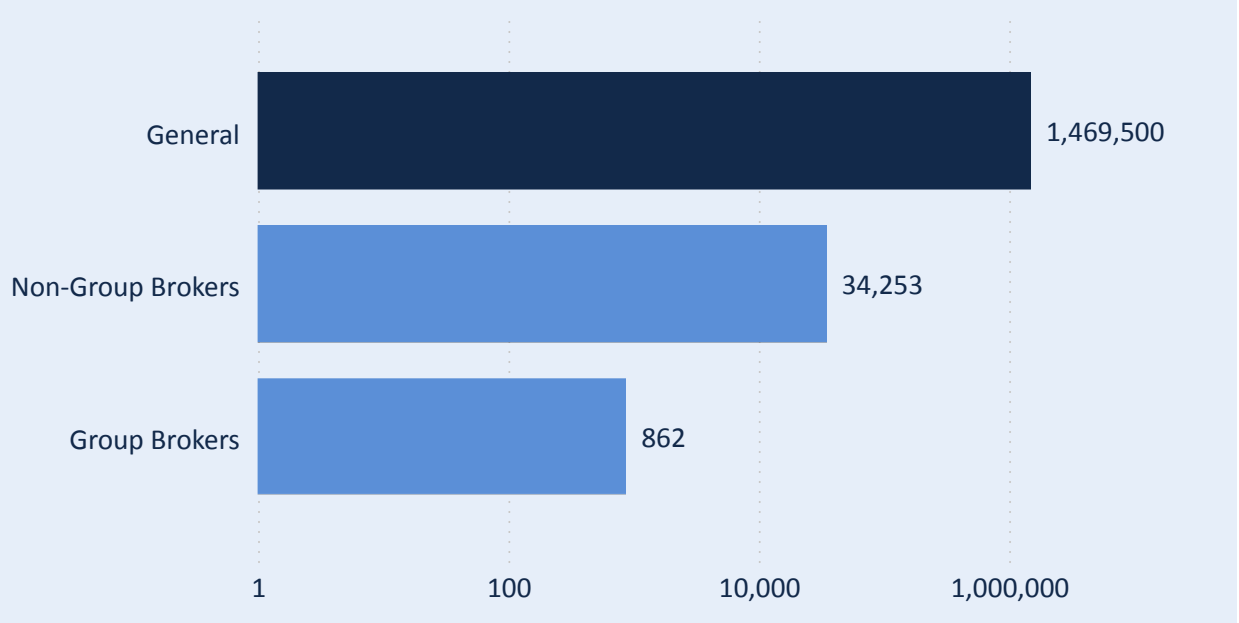
Avg Impressions (Organic) by Content Pillar



Avg Impressions (Organic) by Post Type

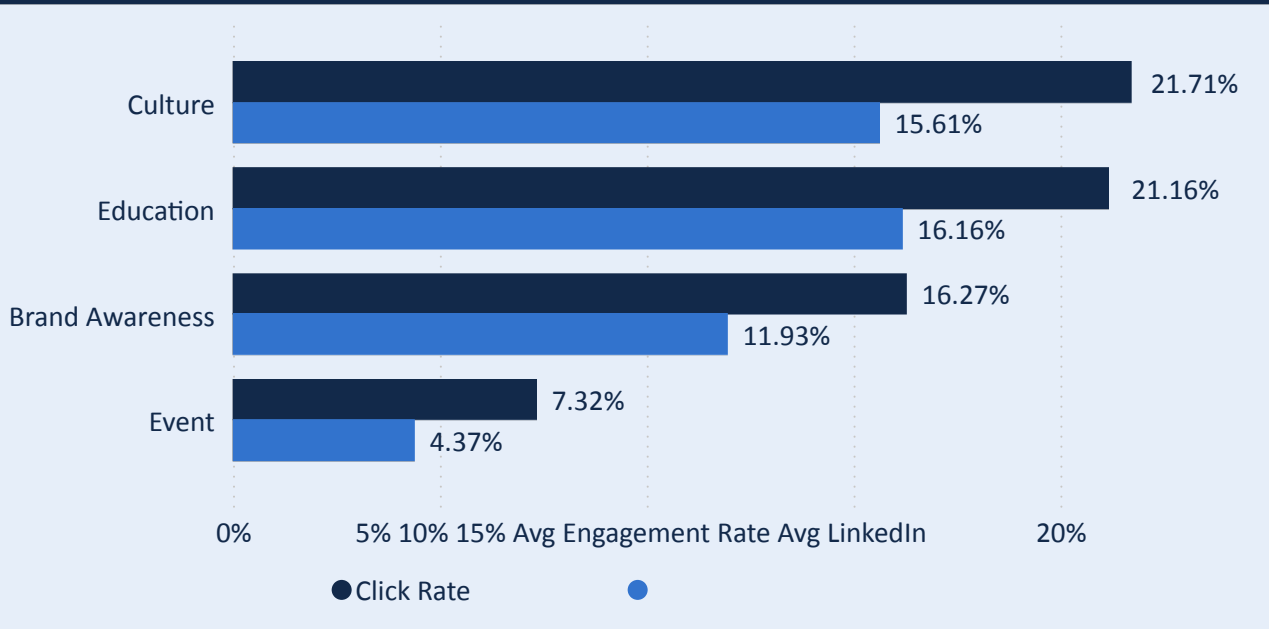


Sum of Impressions by Target Audience

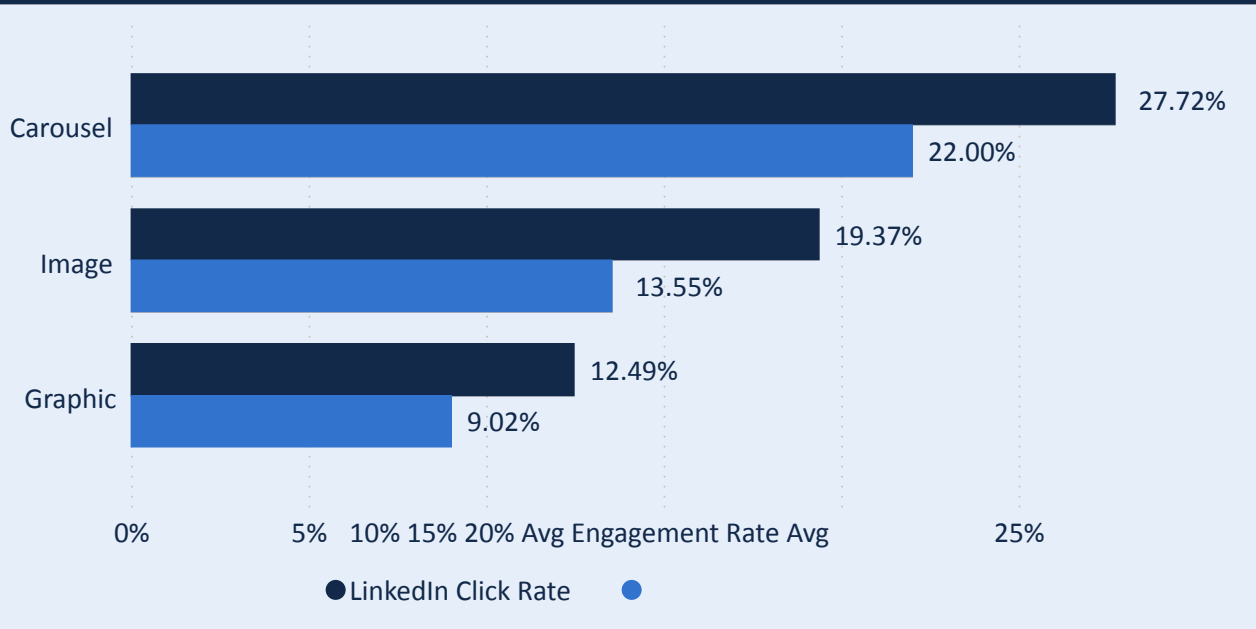


LinkedIn Content Performance Analysis

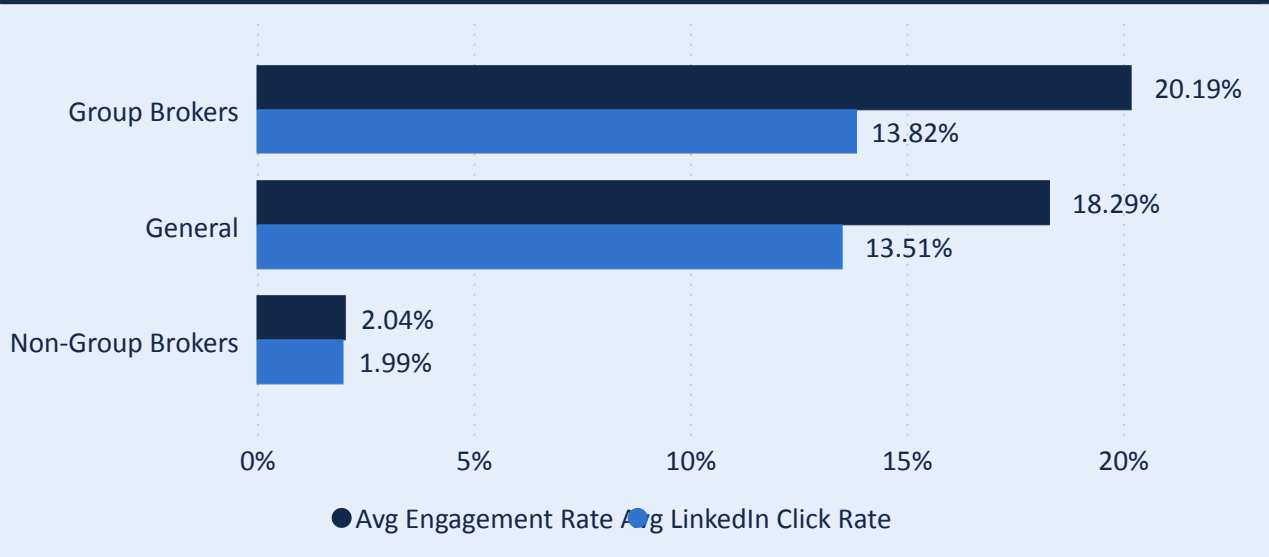
Performance by Content Pillar



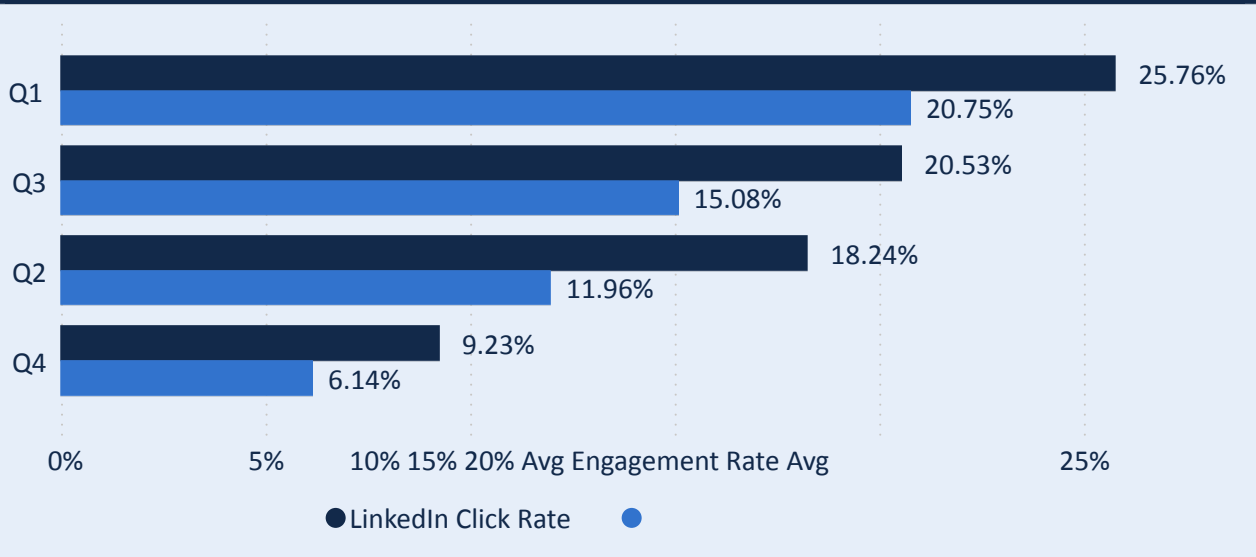
Performance by Post Type



Performance by Target Audience

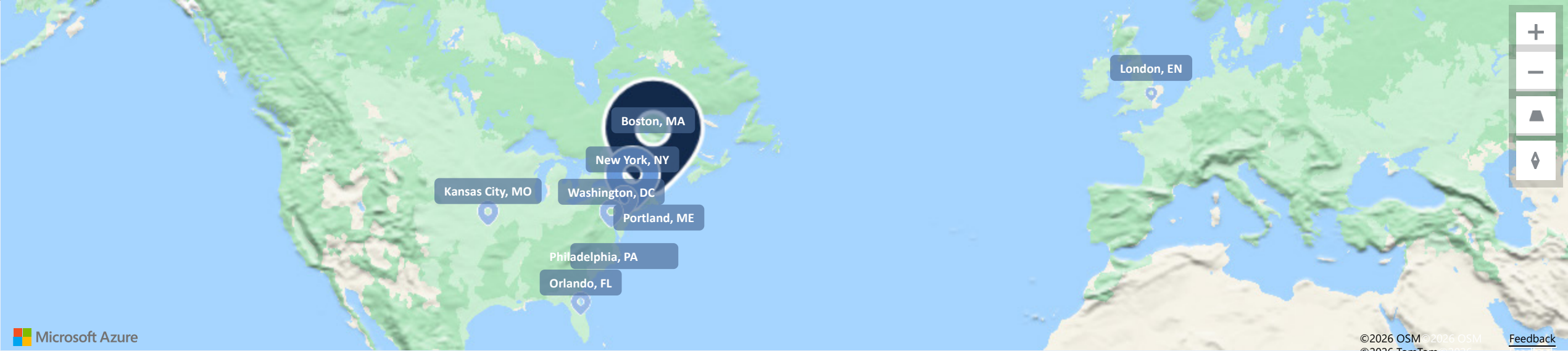


Performance by Quarter

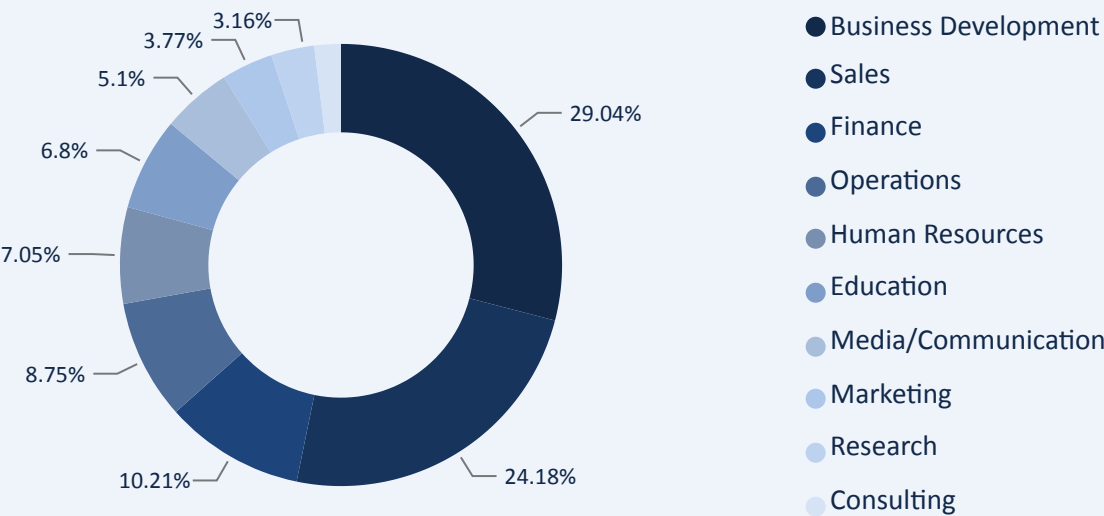


LinkedIn Audience Analysis

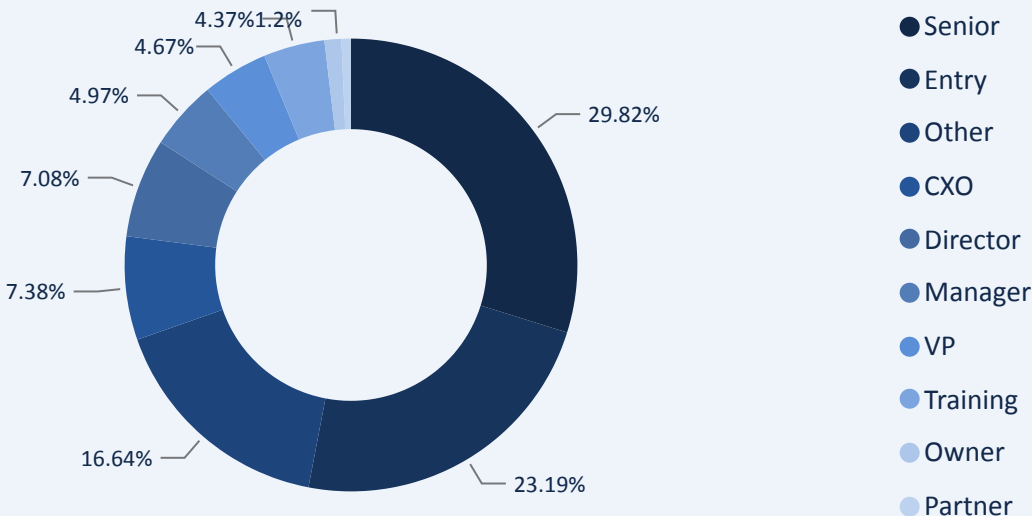
Page Views by Location



Page Views by Job Function



Page Views by Seniority



Email Analysis Cheat Sheet	
Email Diagnostics (Mailchimp): Off-Benchmark Scenarios*	
Scenario: Low Open Rate	
Diagnosis	Action(s)
Sender name isn't trusted	→ Change sender name to a person
Subject line isn't compelling	→ A/B test subject lines
Scenario: Low Click-to-Open Rate	
Diagnosis	Action(s)
Content didn't match the promise of the subject line	→ A/B test Call-to-Action (CTA)
Scenario: High Bounce Rate	
Diagnosis	Action(s)
List quality is degrading	→ Flag bounced contacts in CRM → Perform list maintenance in Mailchimp 48-72 hours following each send
Scenario: Low Open Rate	
Diagnosis	Action(s)
Subject line isn't compelling	→ A/B test subject lines
Sender name isn't trusted	→ Change sender name to a person
*Email service platforms started implementing bot filtering in late 2025. This may cause metrics to appear as if they are trending downward, when they are in fact becoming more accurate. This also impacts industry benchmarks, which are a lagging measure.	

The Growth Ecosystem		
Stage 1: Subscriber (Awareness)		
Email		Social Media
Behavior	In database, but no opens.	Passes through feed.
Signal	"I haven't unsubscribed yet."	"I see you, but I'm passive."
Metrics	Unsubscribe rate & list growth	Impressions & follows
Action(s)	Scrub from list if inactive > 6 months.	Maintain consistency. Don't sell yet.
Stage 2: Marketing Captured Lead (Interest)		
Email		Social Media
Behavior	Opens the email.	Reacts to/views content.
Signal	"Your subject line worked."	"I validate this topic."
Metrics	Open rate	Engagement rate
Action(s)	Analyze which subject lines win.	Invite them to follow the page.
Stage 3: Marketing Qualified Lead (Intent)		
Email		Social Media
Behavior	Clicks a link inside email.	Clicks link or shares post.
Signal	"I read the content and want more."	"I trust you enough to leave the feed."
Metrics	Click-to-open rate	Click rate
Action(s)	Sales Alert: Check what they clicked.	Retarget with product specific content.
Stage 4: Sales Qualified Lead (Conversation)		
Email		Social Media
Behavior	Replies or completes form.	Comments or DMs.
Signal	"I am ready to buy/quote."	"I have a specific question/need."
Metrics	Reply rate & form fills	Comment count
Action(s)	Sales Call: Call within 24 hours.	Direct Outreach: DM them immediately.

LinkedIn Analysis Cheat Sheet	
LinkedIn Diagnostics Off-Benchmark Scenarios	
Scenario: High Impressions, Low Engagement	
Diagnosis	Action(s)
Copy feels 'salesy' or repetitive	→ A/B test content type (videos & carousels tend to drive engagement)
Visual elements feel boring	→ Change content pillar mix
Scenario: High Engagement, Low Clicks	
Diagnosis	Combined LI Actions
CTA is missing, unclear, or irrelevant	→ A/B test CTA wording → Add CTA offering something of value to target audience (e.g., educational resource, tool, complimentary consultation)
Scenario: Low Impressions	
Diagnosis	Combined LI Actions
The algorithm is burying the post due to content elements or low first-hour engagement	→ Have 3 team members react and comment within 1 hour of the post publishing → Upload PDFs/videos natively instead of using external links
**Social media algorithms are regularly updated and are not made public. If a strategy appears to be effective for a period and impressions suddenly drop, look for algorithm update guidance from blog.hootsuite.com or sproutsocial.com/insights .	