

# Engagement Tools Practice Activity Report

For the period 1st July 2019 to 31st July 2019

## Summary



## Key client activity insights

The number of Engagement Tools set-up and sent to your clients this month was **33%** above your practice YTD average

Your client completion rate improved by **15.5%** when compared to your practice YTD average

The most popular tool sent to clients this month was the **Business Risks Survey** and the tool with the highest completion rate was the **RAVDA**.



**Most active team/  
team member (by email):**

scott@bstar.com.au



**Least active team/  
team member (by email):**

grant@bstar.com.au

# Engagement Tools

## Practice Activity Report

For the period 1st July 2019 to 31st July 2019

### Key team activity insight

**scott@bstar.com.au**

ON AVERAGE IS SENDING:

**3** Personal Risks Surveys,  
**18** Business Risks Surveys and  
**5** RAVDAs to your clients each month.

CLIENTS REPRESENT:

**44%** of all Personal Risks Scorecards generated  
**25%** of all Business Risks Scorecards generated and  
**5%** of all RAVDA Scorecards generated across your practice client base who have received an Engagement Tool.

**grant@bstar.com.au**

ON AVERAGE IS SENDING:

**1** Personal Risks Surveys,  
**3** Business Risks Surveys and  
**9** RAVDAs to your clients each month.

CLIENTS REPRESENT:

**5%** of all Personal Risks Scorecards generated,  
**9%** of all Business Risks Scorecards generated and  
**22%** of all RAVDA Scorecards generated across your practice client base who have received an Engagement Tool.

**warren@bstar.com.au**

ON AVERAGE IS SENDING:

**3** Personal Risks Surveys,  
**18** Business Risks Surveys and  
**5** RAVDAs to your clients each month.

CLIENTS REPRESENT:

**44%** of all Personal Risks Scorecards generated  
**25%** of all Business Risks Scorecards generated and  
**5%** of all RAVDA Scorecards generated across your practice client base who have received an Engagement Tool.

**linda@bstar.com.au**

ON AVERAGE IS SENDING:

**1** Personal Risks Surveys,  
**3** Business Risks Surveys and  
**9** RAVDAs to your clients each month.

CLIENTS REPRESENT:




**5%** of all Personal Risks Scorecards generated,  
**9%** of all Business Risks Scorecards generated and  
**22%** of all RAVDA Scorecards generated across your practice client base who have received an Engagement Tool.

# Engagement Tools

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### Month activity

ENGAGEMENT TOOL	PRACTICE EMAIL	MONTH ACTIVITY		YTD ACTIVITY	
		Set-up & sent	Completed	Set-up & sent	Completed
<b>Personal Risk Survey &amp; Scorecard</b> 	scott@bstar.com.au	10	6	40	24
	grant@bstar.com.au	1	1	10	7
	dave@bstar.com.au	5	10	40	24
	clare@bstar.com.au	3	3	10	7
	linda@bstar.com.au	10	6	70	45
	warren@bstar.com.au	1	1	27	22
<b>Business Risk Survey &amp; Scorecard</b> 	scott@bstar.com.au	10	6	40	24
	grant@bstar.com.au	1	1	10	7
	dave@bstar.com.au	5	10	40	24
	clare@bstar.com.au	3	3	10	7
	linda@bstar.com.au	10	6	70	45
	warren@bstar.com.au	1	1	27	22
<b>Risks &amp; Value Driver Assessment</b> 	scott@bstar.com.au	10	6	40	24
	grant@bstar.com.au	1	1	10	7
	dave@bstar.com.au	5	10	40	24
	clare@bstar.com.au	3	3	10	7
	linda@bstar.com.au	10	6	70	45
	warren@bstar.com.au	1	1	27	22