

Chapter 9: Tracking Your Success

Key Metrics to Track

What gets measured gets managed. Track these metrics weekly to understand your pipeline and optimize your efforts:

- Website visits — how many people are viewing your Ethos agent website
- Quote starts — how many visitors are beginning the quote process
- Application submissions — how many quotes are converting to full applications
- Policies issued — how many applications are resulting in active policies
- Conversion rates — website visitor → quote → application → policy
- Referrals given and received
- Social media engagement (likes, comments, shares, link clicks)

Using Your Portal Dashboard

Your Ethos portal provides real-time visibility into your business. Review it daily and note trends. Export data to CSV for deeper analysis. Pay special attention to:

- Application status changes — follow up immediately on pending items
- Which products are converting best for your audience
- Time-to-close from first contact to policy issued

Meta Pixel & Google Tag Analytics

If you've set up your marketing pixels (Chapter 3), use the analytics to understand:

- Which social media posts drive the most website traffic
- Which ad campaigns generate the most quote starts
- Audience demographics — are you reaching the right people?
- Cost per click, cost per lead, and cost per acquisition

Weekly & Monthly Review Cadence

Set aside time each week and month to review your performance:

- Weekly (Friday, 30 minutes): Review portal dashboard, check social media analytics, note what worked
- Monthly (last Friday, 1 hour): Full pipeline review, compare against targets, adjust strategy for next month

KPI Targets: Your First 90 Days

Metric	30-Day Target	60-Day Target	90-Day Target
Portal fully set up	☑ Complete	—	—
Social media posts	50 posts	100 posts	175 posts
Link shares	100 shares	250 shares	500 shares
Website visitors	50	200	500
Quote starts	5	15	30
Applications submitted	—	5	15
Policies issued	—	1	5+
Referral partnerships	—	1	3
New agents recruited	—	—	1

Goal Setting & Accountability

Write down your goals and share them with your mentor at The Policy Shop. Research shows that people who write down their goals and share them with an accountability partner are 76% more likely to achieve them.

- Set SMART goals: Specific, Measurable, Achievable, Relevant, Time-bound
- Break annual goals into quarterly, monthly, and weekly targets
- Celebrate wins — even small ones build momentum
- Review and adjust quarterly based on actual performance data