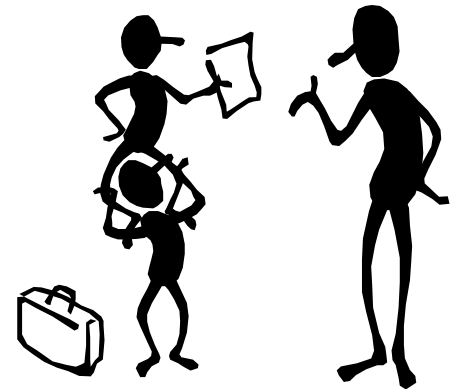


Pre BGA Client Partner Conference The Learning Forum

*Welcome! This Webinar will
be approximately 30 minutes in
length.*

Dial-in: 712-432-3900

Pin: 984124



Agenda

AGENDA		
Sept 10, 2009	Topic	Approx. Time
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	3 minutes
	Pre BGA Client Partner Conference – The Learning Forum John McFadden General Manager, BGA Services Sherri Isaacson Product Manager	25 minutes

Goals of Forum

- Learning from each other
- Share ideas and concepts
- Users helping Users

The Learning Forum Strategy

- Remember – this is not a training session.
 - This is all about comparing notes with one another so all can learn how different agencies deal with these needs in their respective offices.
 - The ultimate goal is to help the participants improve proficiencies in key areas by sharing best practices with one another

The Learning Forum Process

- Flip chart sheets with typical BGA office tasks and workflows to seed the discussion
 - Attendees will be invited to add others of their own choosing
 - All will then be invited to vote on the tasks they would be most interested in seeing how their peers use SmartOffice to accomplish
 - We will work down the prioritized list doing as many as we can in the time available

The Selection Criteria

- We would encourage attendees to select the workflows that they:
 - Would like to be able to use in their office but are having difficulty figuring out how to
 - Are using but maybe not as efficiently as they believe they could and would like to understand how others do them
 - Use, get a great deal of benefit from and have really gotten good at (go for the prize)

Example

Possible Tasks/Workflows

Organized by Area

Sales and Marketing

- Logging quotes and/or proposals
- Using Dynamic Reports and Mass Correspondence
 - Identifying sales/conversion opportunities
 - Identifying Cross Marketing opportunities
 - Other data mining for the marketers
 - Communicating product updates

Sales and Marketing

- Using e-mail templates and attachments
 - From Sets
 - From Dynamic Reports

Agent Licensing and Contracting

- Recruiting agents
- New agent Setup
 - Licensing/Appointment/Contracting
 - E&O / AML
 - Workflow for Obtaining information

New Business

- Process of receiving and reviewing a formal application
- Submitting that application in SmartOffice
 - Ancillary workflows such as handling the paper forms and checks
 - Agent license/appointment/contract issues
 - Contact information
 - Service Provider requests
 - Correspondence
- Submitting a trial application

Underwriting

- Handling carrier underwriting updates
 - Using side by side
 - Deciding what to update
 - Deciding what to communicate
- Using online follow-up
- Using built in workflows
 - Approval workflow
 - Delivery workflow
 - Inforce Workflow

POS

- Dealing with lapse notices
- POS agent requests
- Commission Processing
 - Tracking first payment
 - Tracking to reconciliation
 - Creating payments

CRM

- Using calendaring and tasks to delegate work internally
- Scheduling follow-up activities with agents/advisors
- Scheduling call outs
 - Creating scripts
 - Identifying the target audience call list
 - Putting the call list on the calendar

General

- Tailoring your personal environment to improve efficiencies
- Using the home page
- Navigating (History tab)
- Searching the database (contacts, cases, policies, advisors, etc.)
 - Using search tools
 - Using advanced search techniques
 - Using column filters
 - Using filters
 - Using dynamic reports

Communications

- Using Mass Correspondence
- Changing a destination address
- Dealing with area code changes

Participant Suggestions

- Workflow 1
- Workflow 2
- Task 1
- Task 2

Further Questions?

***How Can We Be a Better
Business Partner?***

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Thank you for your time and your business.



BGA CPC