

SmartOffice 2009 BGA Webinar Series

BGA Correspondence Series: User Best Practices/Scenarios

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

Agenda

| AGENDA | | |
|---------------|---|--------------|
| Sept 24, 2009 | Topic | Approx. Time |
| | | |
| | Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data | 3 minutes |
| | BGA Correspondence Series: User Best Practices/Scenarios Nancy Edwards Training Consultant E-Z Data | 20 minutes |
| | Q&A Session <i>BGA Participants</i> | 5 minutes |

File View Help

Audio

Audio Mode: Use Telephone Use Mic & Speakers

MUTED 000000000

[Audio Setup](#)

Talking: Phone Caller

Agenda

| AGENDA | |
|-----------------|--|
| August 27, 2009 | Topic |
| | <p>Welcome and Introduction</p> <p>Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data</p> |
| | <p>Pre BGA Client Partner Conference Wish List Review</p> <p>Sherri Isaacson Product Manager E-Z Data</p> |

Questions

Questions Log

Q: chat chat chat...

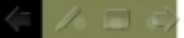
Q: Type your questions here...

Send

BGA Practice Webinar - On Aug. 26th
Webinar ID: 458-104-290

GoToWebinar™

PRACTICE MANAGEMENT | AGENCY MANAGEMENT | CLIENT RELATIONSHIP MANAGEMENT



E-Z Data Confidential

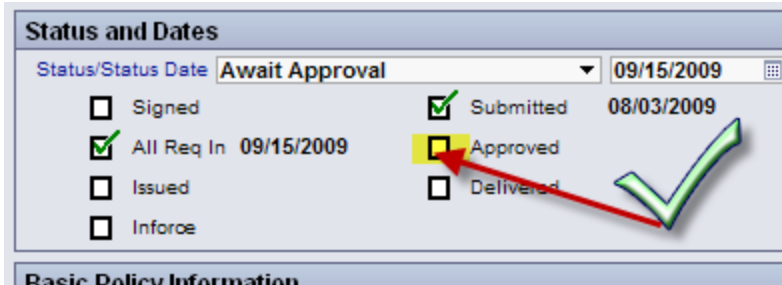


Talking: Phone Caller

79%



1. How to automate letters when the PCM Case Status is changed



Status and Dates

Status/Status Date: Awaiting Approval 09/15/2009

Signed Submitted 08/03/2009

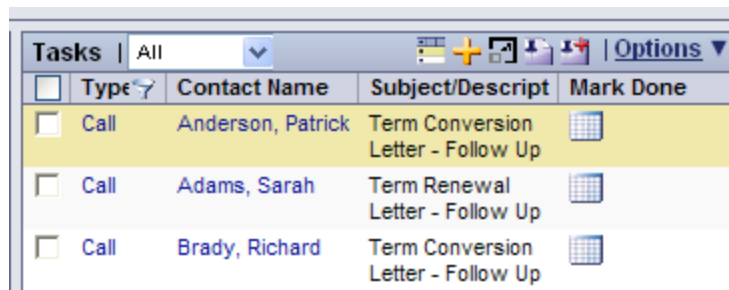
All Req In 09/15/2009 Approved

Issued Delivered

Inforce

Basic Policy Information

2. How to send Mass Correspondence generate Calendar "Call" Activities



| Type | Contact Name | Subject/Descript | Mark Done |
|------|-------------------|------------------------------------|--------------------------|
| Call | Anderson, Patrick | Term Conversion Letter - Follow Up | <input type="checkbox"/> |
| Call | Adams, Sarah | Term Renewal Letter - Follow Up | <input type="checkbox"/> |
| Call | Brady, Richard | Term Conversion Letter - Follow Up | <input type="checkbox"/> |

Presented by
Nancy Edwards, E-Z Data Inc. Training 9/24/09

Incorporate Best Practices

1. Standardize (*and document*) correspondence to Advisors
2. Provide ability to customize letters before mailing “User-Input”
3. Keep your Advisors informed with automated workflow “Letter Set Up”
4. Audit letters being mailed to avoid redundancy ...use the “Exclusion” feature
5. **Follow-up**...generate automated “call” activity tasks

1. How to create and automate letters to coordinate with PCM Workflow when the Case Status is changed

Status and Dates

Status/Status Date: **Await Approval** | 09/15/2009

| | |
|---|--|
| <input type="checkbox"/> Signed | <input checked="" type="checkbox"/> Submitted 08/03/2009 |
| <input checked="" type="checkbox"/> All Req In 09/15/2009 | <input type="checkbox"/> Approved |
| <input type="checkbox"/> Issued | <input type="checkbox"/> Delivered |
| <input type="checkbox"/> Inforce | |

Basic Policy Information

Pending Case

List | Detail (P) | Requirements | Delivery (G) | Advisor Requests

Policy Insured List

| Issued Class | Issu Rate | Issu Age | Save Age | Remarks |
|-----------------|-----------|----------|----------|--------------------|
| Standard Smoker | | 34 | 34 | due to lab results |

SmartOffice -- Webpage Dialog

There are letters attached to this status. Send them now?

Send using recipients preferred communication

How to set up letter to prompt at Status Change

Navigate History

- Calendar
- People & Companies
- Sales & Marketing
- Reports
- Insurance
- Utilities
- Setup**
 - User Preferences
 - User Accounts
 - User Groups
 - Resource Management
 - User Rights Templates
 - Installations
 - Office Settings
 - Filters
 - Document Administration
 - Call Script Setup
 - Excel Templates
 - SmartView for Clients Setup
 - Opportunity Setup
 - Policy/Case Setup**

Policy/PCM - Master Setup List

- Requirements
- Follow-Up Requirements
- Status Setup**
 - Relationship Setup
 - Status Exclusion
 - Letter Setup**
- Licensing/Contracting Setup
- PCM Workflows
- Informal PCM Workflows
- DataXchange Setup
- NAILBA/ACORD Codes
- SmartView for Advisor Privacy
- Initial Requirement Load
- PCM Status Merge Code

Auto Send Letter List

| <input type="checkbox"/> When Status Becomes | Document |
|--|---------------------------------|
| <input checked="" type="checkbox"/> Approved | Advisor - Approval Notification |
| <input type="checkbox"/> Issued | Agent - Delivery Letters |

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Auto Send Letter Detail

Letter: **Advisor - Approval Notification**

Status: **Approved**

Role: **Primary Advisor**

OK Cancel

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Add "User Input" prompts to customize documents at Runtime

Document Administration

| Document | Purpose | Open | Modified By | Modified On | Office |
|---------------------------------|--------------------------------|------|-------------|--------------------|--------|
| Advisor - Approval Notification | PCM/UW - Addressed to Advisors | | Nancy | 09/22/2009 05:32PM | Nancy |

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General Information
Category:
Title:
Keyword:
Purpose:
Expires On:
HIPAA Protected:
 Do not allow deletions/modifications by other users
Format: RTF
Status: Active
Type: Form Letters

Runtime User Input Prompts
User Input 1:
User Input 2:
User Input 3:
User Input 4:
User Input 5:
User Input 6:
User Input 7:
User Input 8:
User Input 9:

SmartOffice -- Webpage Dialog

Run-time User Inputs For Advisor - Approval Notification

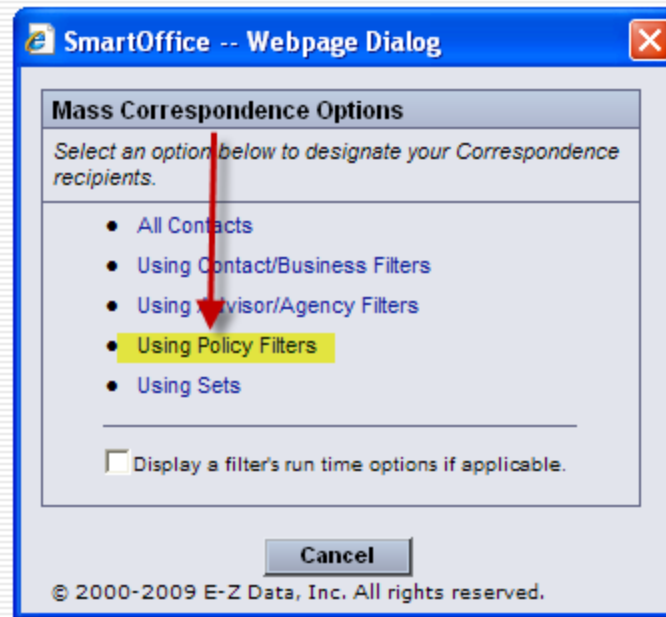
Please enter the text you would like merged into the printed document.

Add Note(1) Ie: Save Age/Issue Date/other
The policy has been back dated to 8/1/09 to save age 34.

Add Note(2) Expected Time For Policy Mailing
The Carrier is currently back logged in their policy issuance and may take up to 4 weeks for mailing.

Add Note(3)
Congratulations on the case approval!

2. How to send Mass Correspondence to clients and generate Calendar “Call” Activities



Select a Filter and a Letter *then go to* Options to Create Follow-up Activity

Term Renewal Letter

Main | **Options** | Sort | Exclude

More Options

| | |
|--|---|
| <input checked="" type="checkbox"/> Print One Letter per Household | <input checked="" type="checkbox"/> Post to Letter Loo/SmartPad |
| <input checked="" type="checkbox"/> Apply Contact's Mail Privacy | <input type="checkbox"/> Create Follow-up Activity |
| <input checked="" type="checkbox"/> Preview before printing | |

Add Header/Footer

| | |
|---|---|
| Header | Remove |
| Footer | Remove |
| <input type="checkbox"/> Print header on first page only. | <input type="checkbox"/> Print footer on first page only. |

⏴

Create Mass Correspondence Calendar Activities

SmartOffice -- Webpage Dialog

Mass Activity Creation Options

- Select one or more user(s) from the following list.
- If multiple users are selected, the system creates activities sequentially.
- Max Calls per Day indicates the maximum number of calls to be created for each user on any day.

Use Primary Advisor & User Assignment of each Contact for Activity Participants

Available Users from Training3 Office | Options ▾

Please select one or more Users from User List.

| <input type="checkbox"/> | User Full Name | User Type | Status | Office-User Name | Created On |
|-------------------------------------|-----------------|------------------|---------|------------------|----------------------------------|
| <input checked="" type="checkbox"/> | Nancy Edwards | Producer/Manager | Enabled | Nancy Edwards | 05:30PM 06/11/2009 03:50PM |
| <input type="checkbox"/> | Matt Dorio | Producer/Manager | Enabled | Matt Dorio | 08/05/2009 11:52AM |
| <input type="checkbox"/> | Marlon Urias | Producer/Manager | Enabled | Marlon Urias | 08/18/2005 03:31PM |
| <input type="checkbox"/> | Mark Paladian | Producer/Manager | Enabled | Mark Paladian | 08/27/2001 05:29PM |
| <input type="checkbox"/> | Manny Silverman | Staff | Enabled | Manny Silverman | 01/06/2003 08:07PM |

Create Calendar Activities

Type: **Call** | Max Calls per Day: **15** | # of Days between Calls: **2**

Sub-Type: | Skip Saturday | Skip Sunday | Tracked

Create Activities After: **6** day(s) | Call Script: _____

Audit to avoid redundancy using the “Exclude” feature

Main | Options | Sort | Exclude

Exclude Contact by Filter

Filter

Exclude Contact by Set


Set

Exclude Contact by Last Sent Date

From

Through

Use Selected Form Letter



Now let's go to

SmartOffice > > >

"Takeaways"

Incorporating Best Practices with **SmartOffice Functionality**

1. Standardize letters in Document Management using the
"Purpose" example: **PCM/UW – Addressed to Advisors**
2. Provide ability to customize letters
"Runtime User Input Prompts"
3. Keep your Advisors informed using
PCM "Letter Set Up"
4. Audit letters being mailed with use of the
"Exclusion" feature
5. **Follow-up**...use Mass Activity Creation Options to
Create Calendar "Call" Activities

Further Questions?

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

E-mail: meg.rose@ezdata.com

Phone: (626) 585-3505 x7366

Thank you for your time and your business.