

# SmartOffice 2009 BGA Webinar Series

## 2009 BGA Webinar Series Special Edition: SmartOffice 7.0 Release

*Welcome! This Webinar will  
be 60 minutes in length.*



# Agenda

AGENDA		
June 25, 2009	Topic	Time
	<b>Welcome and Introduction</b>  John McFadden General Manager, BGA Services E-Z Data  Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	<b>SmartOffice 7.0 – Key Changes and Improvements for BGAs</b>  Sherri Isaacson, Product Manager E-Z Data	40 minutes
	<b>Additional Q&amp;A Session</b>  <i>BGA Participants</i>	10 minutes

# 2009 BGA Webinar Series

- 30 minute sessions with high-impact, quick takeaways (***practical tips for marketing, sales, relationship-building and agency management***)
- Learn new tricks (sooner than later)
- Teach yourself new habits
- Focus on core competencies of wholesale brokerage
- E-Z Data “Virtual University” concept



Visit [www.ezdata.com/bga](http://www.ezdata.com/bga) for a 2009 Schedule

# SmartOffice 7.0

## Preview of Key Changes

Sherri Isaacson,  
Product Manager, E-Z Data

# General

- > Home Page Themes
- > Filters
  - User running this report
  - User with Proxies
- > New Office & User Settings
- > Mass Correspondence changes

# Pending Case / Policy

- Requirement Notes
- New Premium Section
- Option on Product / Policy & PCM
- SmartPad Quicksearch

# Commission Related

- Options
- Edit in Rate File
- Copy Bands within a Rate

# Email Posting

- > Multiple e-mail message posting
- > Multiple e-mail posting workflows
- > Ability to post without signing in to SmartOffice
- > Intelligent e-mail posting to pending cases

# Annual BGA CPC is Fast Approaching

- > *September 13-15, 2009*
- > Downtown St. Louis, MO
- > Exceptional learning and networking opportunities
- > New Learning Forum Sunday!
- > User Driven through  
Input from BGA Advisory Council
- > Take Me Out to the Ball Game
- > Register at: [www.ezdata.com/bga](http://www.ezdata.com/bga)



# Next BGA Webinars

*Save the Date!*

**Correspondence Series: Letter  
Writing and Mass Correspondence**

**7.2.09 at 2pm ET (30 minutes)**

*Note: Some of you will also get invite to 6/30  
session for general review of SmartOffice 7  
(being introduced by server)*

# We Want Your Input

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

Suggestions for topics or to request further  
business development and partnership  
opportunities?

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Phone: (626) 585-3505 x7366

*Thank you for your time  
and your business.*