

SmartOffice 2009 BGA Webinar Series

BGA Marketing Series: SmartOffice Opportunities

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

Dial-in: 712-432-3900

Pin: 984124



Agenda

AGENDA		
May 7, 2009	Topic	Time
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	SmartOffice's Opportunity Module Marlon Urias, Manager, Support & Training Services E-Z Data	20 minutes
	Q&A Session <i>BGA Participants</i>	5 minutes

Using iLINC 10

> iLinc Version 10

The screenshot displays the iLinc 10 interface for a "BGA Webinar Series" session. The window title is "iLinc | BGA Webinar Series" and the menu bar includes "File", "Edit", "Controls", "Tools", "Session", and "Help". The interface is divided into several sections:

- Top Bar:** Shows "Dial In Number: 218-486-7200" and "Passcode: 171058".
- Attendees:** A video window shows "Meg Rose" with 0/1 attendees.
- Feedback:** A section with the text: "To request Feedback, select Answer Set from Feedback menu".
- Chat:** A chat window with "Public" and "Private" tabs and a text input field.
- Main Content Area:** Displays "Session Details" (Session Name: BGA Webinar Series, Leader: Meg Rose, Date/Time: 02/26/2009 02:00 PM) and "Audio Details" (Primary Dial-In: 218-486-7200, Passcode: 171058).
- Right Panel:** A list of sharing and control options: "Share your Desktop", "Share a Region", "Share an Application", "Draw on a Whiteboard", "Send Quick Invitation", "Send Invitation via IM (copy)", and "Record Session".
- Bottom Bar:** The Windows taskbar shows the "start" button and several open applications: "4 Microsoft...", "2 Yahoo! Me...", "Webinars", "Microsoft Pow...", "iLinc - Window...", and "iLinc | BGA We...". The system clock shows "3:07 PM".

A red arrow points to the Chat window on the left side of the interface.



2009 Webinar Series

> Builds on format and growth of 2008 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 for a 2009 Schedule!



Topics for Today's Session

- 1. Opportunities let you define your own processes*
- 2. Annuities expert tracking requests for help*
- 3. What happened with all the requests I get? Are they submitting business?*
- 4. Opportunity works very well with the calendar*
- 5. Homepage reports – Stale leads, Sales by Rep*
- 6. Great for managers to track the work of their team*

Takeaways from Today's Session

1. *Don't let things fall through the cracks*
2. *Do not create too many Processes*
3. *You don't **have** to track just sales*
4. *Advisor record can be your "prospect"*
5. *E-Z Data uses Opportunity to track all of your Training Projects*
6. *Want Opportunities? Call us!*
7. *Want training to set it up? Watch our training movies or call us!*

Plan to Attend the BGA CPC 2009!

- > September 13-15, 2009
- > St. Louis, MO
- > Exceptional learning and networking opportunities
- > BGAs, Carrier and Vendor Partners
- > User Driven - Input from BGA Advisory Council on meeting content
- > Take Me Out to the Ball Game...
- > Register at: www.ezdata.com/bga



Next BGA Webinar

PCM: APS Reimbursement

5.21.09 at 2pm ET

Watch for E-mail Invite Coming Soon!

We Want Your Input

How Can We Be a Better Business Partner?

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

E-mail: meg.rose@ezdata.com
Phone: (626) 585-3505 x7366

*Thank you for your time
and your business.*