

SmartOffice 2009 BGA Webinar Series

2009 BGA Webinar Series: SmartOffice PCM Workflow Set-up (Formals)

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

Dial-in: 712-432-3900
Pin: 984124



Agenda

AGENDA		
July 2, 2009	Topic	Time
	Welcome and Introduction Meg Rose, FLMI, ACS Business Relationship Manager E-Z Data	5 minutes
	SmartOffice and PCM Workflows Adrienne Blankenship, Trainer 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 web browser interface for a "BGA Webinar Series" session. The window title is "iLinc | BGA Webinar Series". The menu bar includes "File", "Edit", "Controls", "Tools", "Session", and "Help". The top toolbar shows various icons for video, audio, chat, and sharing, along with the "Dial In Number: 218-486-7200" and "Passcode: 171058".

The main content area is divided into several sections:

- Attendees:** Shows 0 / 1 attendees. A video feed of Meg Rose is visible.
- Session Details:**
 - Session Name: BGA Webinar Series
 - Leader: Meg Rose
 - Date/Time: 02/26/2009 02:00 PM
- Audio Details:**
 - Primary Dial-In: 218-486-7200
 - Passcode: 171058
- Feedback:** A section with the text "To request Feedback, select Answer Set from Feedback menu".
- Chat:** A chat window with "Public" and "Private" tabs.
- Sharing (Meg Rose):** A sidebar on the right with 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".

The bottom of the window shows the Windows taskbar with 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".

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 for a 2009 Schedule

Focus of Today's Session

The Importance of PCM Workflow Set-up

- reduce processing time by automatically adding case requirements
- help the processor avoid an unnecessary break in the process
- give the administrator the ability to set default values for searches and requirement statuses.
- allow you to define when a requirement is “completed” and when to move to the next phase of the workflow

A Look at Setting Up PCM Workflows in SmartOffice

Adrienne Blankenship
Trainer, BGA Services, E-Z Data

Takeaways from Today's Session

1. The workflows discussed today are office-level settings defined by your office decision makers and/or administrator.
2. By reviewing the setup today, you have the opportunity to see how your system can be setup and determine if any changes need to be submitted to your admin team.
3. We recommend that the setup should occur as soon as you go live SmartOffice but these settings can be changed at any time.

Annual BGA CPC is Fast Approaching

- > *September 13-15, 2009*
- > St. Louis, MO
- > Exceptional learning and networking opportunities
- > New Pre-Conf Session Sun afternoon
- > User Driven - Input from BGA Advisory Council
- > Take Me Out to the Ball Game – It's fun too!
- > Register at: www.ezdata.com/bga



Next BGA Webinar

BGA Use of Licensing and Appointment Data in SmartOffice

Meg Rose and Todd Cohen

7.16.09 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?

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Phone: (626) 585-3505 x7366

*Thank you for your time
and your business.*