

SmartOffice 2009 BGA Webinar Series

2009 BGA Webinar Series: SmartOffice PCM Workflows

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

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



Agenda

AGENDA		
June 4, 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 toolbar shows various controls like mute, video, and chat, 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, several open applications (Microsoft Office, Yahoo! Messenger, Webinars, Microsoft PowerPoint, iLinc - Window..., iLinc | BGA We...), and the system clock showing 3:07 PM. A red arrow points from the left side of the slide towards the chat window.

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

An Overview of PCM Workflows

- What they are
- What they do
- How they can help you

Do you have them? Are they “right” for your office? Do you need to evaluate or add more?

Focus of Today's Session

Using PCM Workflows you can define your pending case process by:

- Determining which requirements can be added throughout the underwriting process
- Avoiding a break down in the follow up process

A Look at PCM Workflows in SmartOffice

Adrienne Blankenship
Trainer, BGA Services, E-Z Data

Takeaways from Today's Session

1. Benefits of Using the Initial PCM Workflow

- Allows you to define the initial status of the case & requirements
- Automatically loads specific requirements based on what is selected during application submission
- Ability to define when the requirements should be considered complete and removed from the follow-up list
- Defines the default settings for PCM, Policy, and Follow –up lists

2. Benefits of Using the Await Approval Workflow

- Defines when the system should change the status of the case to “Await Approval”
- Automatically loads an await approval requirement with a follow-up date
- Automatically changes the status and removes the requirement if another requirement is added to the system.

Takeaways from Today's Session

3. Benefits of the Approval Received Workflow

- Allows SmartOffice to receive and complete the Await Approval requirement with details and remarks of the approval
- Adds a “policy “ delivery requirement in the delivery section.

4. Benefits of the Issued Delivery Workflow

- Automatically receives and completes the policy requirement.
- Displays the issued dialog box allowing the case manager to enter in policy information (policy number, delivery requirements, issue date, etc)

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 Webinars

**Final 2008 BGA Wish List
Review Session
6.18.09 at 2pm ET**

and

**Special Edition: SmartOffice 7.0 –
BGA Overview
6.25.09 at 2pm ET (1 HOUR)**

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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*Thank you for your time
and your business.*