PRACTICE MANAGEMENT | AGENCY MANAGEMENT | CLIENT RELATIONSHIP MANAGEMENT

# SmartOffice 2009 BGA Webinar Series

# BGA SmartOffice Wish List
# Quarterly Update

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

**Dial-in: 712-432-3900**

**Pin: 984124**

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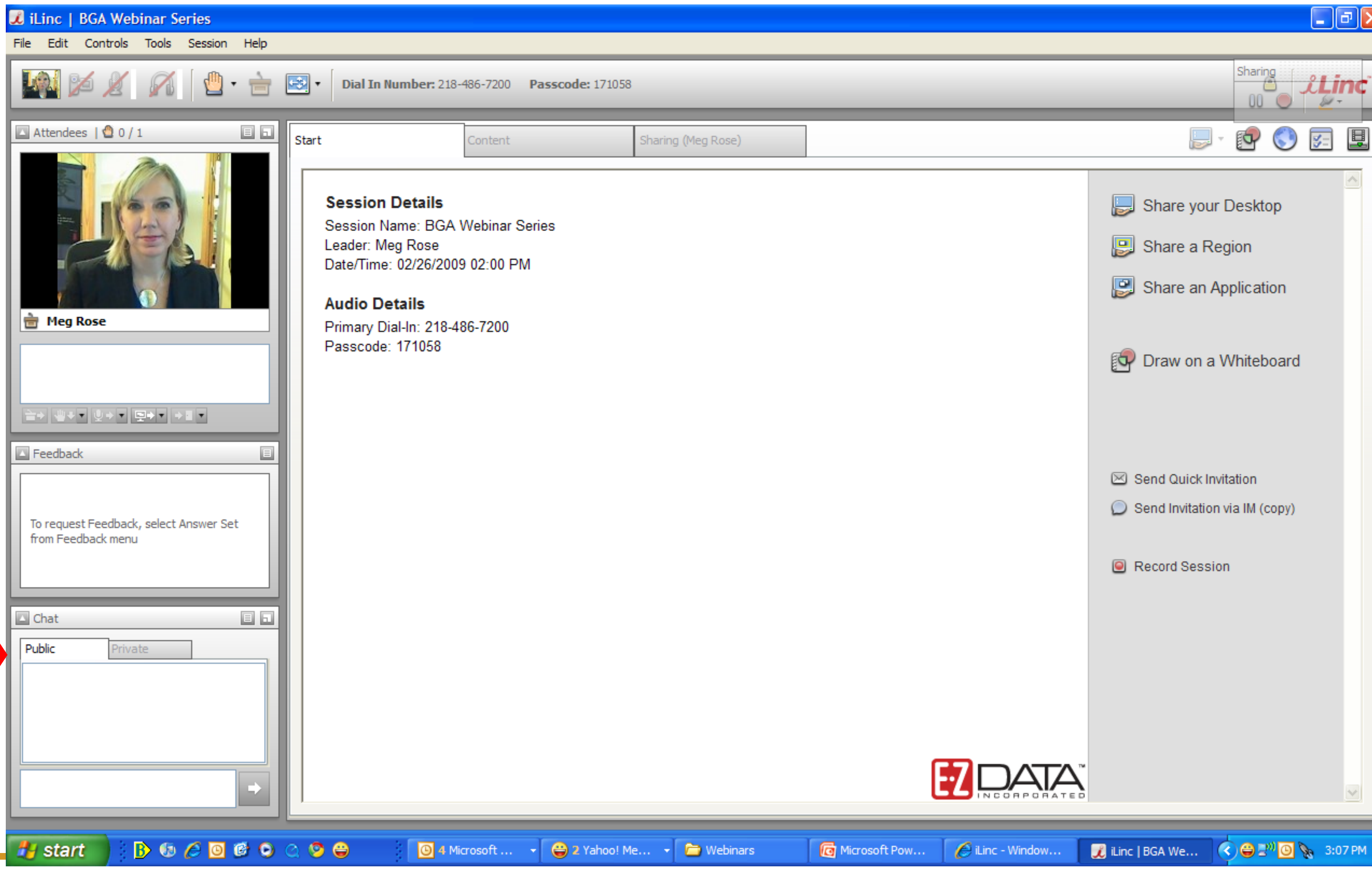
# Agenda

| AGENDA | | |
|---|---|---|
| **April 23, 2009** | **Topic** | **Time** |
| | | |
| | **Welcome and Introduction**<br>John McFadden<br>General Manager, BGA Services<br><br>Meg Rose, FLMI, ACS<br>Business Relationship Manager<br>E-Z Data | 5 minutes |
| | **Wish List Quarterly Update**<br><br>Sherri Isaacson, Product Manager | 20 minutes |
| | **Q&A Session**<br><br>*BGA Participants* | 5 minutes |

# Using iLINC 10

> iLinc Version 10

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# 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!

# Top 10 PCM Requests

# # 10

Do automatic calculations for Commissionable Annualized premium that take into consideration the Target amount, lump sums and 1035 exchange money

**Available in Next Release**

# # 9

The ability to establish follow-up cycles on Business days not Calendar days.
So if a follow-up is a two day cycle and today is Friday it will be set for Tuesday and not Sunday

**Under Evaluation**

# Tie 8/7

When adding a new case have an ability to easily enter owner and trust information

**In Production**

Allow the Date of Birth of the Insured to be visible on the detail tab of the pending case

**In Production**

# Tie 6/5

Include the fields Date Ordered and Date Received on all Requirement summary and detail screens. Status, completed and follow-up date are the only ones available

**In Production**

The application/policy needs to show the proper age calculation and this age must be editable by the user

**In Production**

# # 4

Display only current rate classes in PCM
Old rate classes cannot be deleted when linked to existing cases so the list is too long to manage

**Available in Next Release**

# # 3

Allow the posting of emails from Outlook into SmartOffice to be Smarter. Have it search the subject line to determine which case it should be posted to

**Under Evaluation**

# # 2

The posting process of Emails from Outlook to SmartOffice needs to be improved to speed up the process.  Too many clicks!

**In Production**

# # 1

Delivery Requirements need additional lines

**In Production**

# Top 10 Summary

| | | |
|---|---|---|
| Delivery Requirements need additional lines. | ✓ | PCM |
| The posting process of Emails from Outlook to SmartOffice needs to be improved to speed up the process.  Too many clicks ! | ✓ | Utilities |
| Allow the posting of emails from Outlook into SmartOffice to be Smarter. Have it search the subject line to determine which case it should be posted to. | | Utilities |
| Display only current rate classes in PCM. Old rate classes cannot be deleted when linked to existing cases so the list is too long to manage. | ✓ | PCM/Policy |
| The application/policy needs to show the proper age calculation and this age must be editable by the user. | ✓ | PCM/Policy |
| Include the fields Date Ordered and Date Received on all Requirement summary and detail screens. Status, completed and follow-up date are the only ones available. | ✓ | PCM |
| Allow the Date of Birth of the Insured to be visible on the detail tab of the pending case. | ✓ | PCM |
| When adding a new case have an ability to easily enter owner and trust information. | ✓ | PCM |
| The ability to establish follow-up cycles on Business days not Calendar days. So if a follow-up is a two day cycle and today is Friday it will be set for Tuesday and not Sunday. | | PCM |
| Do automatic calculations for Commissionable Annualized premium that take into consideration the Target amount, lump sums and 1035 exchange money. | ✓ | PCM/Policy |

# The Rest of the Story

# Top 50% of Requested items

| | | |
|---|---|---|
| The ability to remove requirements from the on-line follow-up list without having to complete them. A quick and easy process like a done button. | | PCM |
| The ability to identify a follow-up date when adding requirements. | ✓ | PCM |
| A method of keeping customers informed of outstanding issues in an electronic forum. | ✓ | Other |
| Allow the plan type on an Informal application to be changed once the informal has already been added. | | PCM |
| Ask your BGA partners for feed back (or wishes") more than just once a year. | | Other |
| The letter processing (preview and print) needs to be faster | ✓ | Utilities |
| Ability to delete options out of choice boxes | ✓ | Base |

# Top 50% of Requested items

| | | |
|---|---|---|
| PCM reports days in underwriting when you enter in a new case regardless of status. Would like to be able to track days in underwriting once it is in the submitted status and not in entered status. | | PCM |
| Allow a product copy feature for quickly establishing new products. | ✓ | Product |
| The ability to have a Resend button within SmartPad to allow a resend of an e-mail. | ✓ | Base |
| Spell check in SmartPad notes and in PCM follow-ups similar to the Spell check in Outlook. | | Base |
| When you check the box on the detail screen to show the policy has been issued the workflow should pull up the delivery information screen and once completed take you to the delivery tab and not the detail tab of the case. | ✓ | PCM |
| Have a workflow for advisors that consolidates the add of a new advisor to include CE, E & O, Licensing, Contracting etc. Something very quick instead of so many locations to go and enter data. | | Advisor |
| Allow different email addresses or mailing addresses to be different by type. So correspondence sent to an advisor for pending case could be different for commissions as an example. | | Base |
| Enhance LTC including a drop down box for inflation protection. Also include check boxes for reimbursement and indemnity. | | PCM/Policy |

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# Top 50% of Requested items

| | | |
|---|---|---|
| Copy of Policy / Pending Case | | PCM/Policy |
| Save attachments to E-mails in SmartPad right along with the Letter | | Base |
| CTM Process Workflow support | | CTM |
| The ability to privatize a document in the document summary just like SmartPad notes can be privatized and not seen by the Advisor View or Assignment list. | | Base |
| The ability to identify a template for requirements so like cases you can pick the template and not re-enter the requirements. A copy button may work as well to copy requirements from one case to another. | | PCM |
| Allow an automatic feature to request save age if within a specific time period. | | PCM |
| Allow posted illustrations to be visible from Smart View for Advisor | | SV4A |
| We need additional access points to the imaging system. For example from the advisor and contact screens. | ✓ | Utilities |

# Top 50% of Requested items

| | | |
|---|---|---|
| The ability to link only the reply section of an email in SmartPad instead of linking the whole e-mail chain. | | Base |
| Allow rates to be updated and inserted using an Excel spreadsheet instead of updating them using the user interface. | ✓ | CTM |
| SmartOffice should be smart enough to see that a license, contract, appointment etc has expired and move the status associated to Inactive. | | Base |

# The Rest

| | | |
|---|---|---|
| The on-line follow-up system should have a facility to show just the case as an item to follow-up on instead of displaying multiple requirements for the same case. | | PCM |
| Allow a sort option on the summary screen of Pending Case to allow a sort by date of last change. It would be updated if anything on the case was updated, requirements, notes, correspondence sent etc. | | PCM |
| Advisor area: Display area for Addresses and phone numbers are too small. Need space for at least 4 lines. | ✓ | Advisor |
| E-mails are stored in SmartPad that may have been logged by other users. It would be helpful to be able to pull up one of these emails and reply to the stored email. | ✓ | Base |
| Merge codes need to work if available for correspondence! | ✓ | Base |
| When editing requirements allow the remarks columns to be editable without having to drill into each individual requirement. | ✓ | PCM |
| Append notes on Activities to the original note so they are all in order and not placed in date order where it loses the continuity with the original note on the activity. | | Base |

# The Rest

| | | |
|---|---|---|
| Allow the commission rate file to be banded by Option on a given Product. | ✓ | CTM |
| When adding requirements why can't we be taken to an editable spreadsheet to finish the edits of notes, service providers, follow-up dates etc? | | PCM |
| On the set up of a pending case, have the ability to put in a base amount and a term rider amount and be able to see this on the details page of the client information. | | PCM/Policy |
| A generic plan should be available when adding an Informal Application. | | PCM |
| Informal Application Requirement handling should be easier. Allow a copy from one case to the other. | | PCM |
| Merge codes to include Not completed requirements" for both Underwriting and Delivery. We have a variety of merge codes for open received etc but not one that shows all requirements that do not yet have a completed date." | | PCM |
| Mass correspondence needs to be a background process and the speed must be improved for the execution. | ✓ | Utilities |
| The ability to copy or split a joint policy if one of the Insured's has been declined. | | PCM |

# The Rest

| | | |
|---|---|---|
| Create two unique id numbers for Survivorship UL policies so each insured could have its own Image file. | | Integration |
| Additional User customizable fields located on the detail page of the case. Examples would be for identification of riders, agent to pick up policy etc. | | PCM/Policy |
| Include a child rider check box on the detail page to keep track of the riders. | | PCM/Policy |
| The new application add process should include the request to add impairments so they do not have to be added after the application is entered. | | PCM |
| The preview of correspondence should display at 100% instead of defaulting as 54% to save having to expand the letter each time. | | Utilities |
| We need more packaged report in the system for Commission related items. | | CTM |
| Support the integration between SmartOffice and the desktop version of Winflex. | | Integration |
| The advisor request section must have an option to close" as request. " | | Advisor |

# The Rest

| | | |
|---|---|---|
| Allow notes from the client to be copied down to the individual PCM record allowing for a full diary of notes at the PCM level. | | PCM |
| Better Data Conversion | ✓ | Other |
| Custom Merge Codes for Inforce | | Policy |
| In Pending Case a Merge code for: Policy Insured + Issued Class + Remarks on the Issued Class | | PCM |
| To be able to access SmartOffice with Safari and Firefox browsers | * ✓ | Other |
| Allow a Full import of a policy from another system even from a carrier if required. | ✓ | Integration |
| Standardized reports that provide better information so no one in my office has to figure out dynamic reports. | ✓ | Other |
| Add additional summary fields to be visible on the main panel of Continuing education. An expiration date, remarks etc. | | Advisor |
| Pending case add for Group Policies. Requirement tracking just like individual cases. Allow for viewing by SmartView for Advisors. | | GBM |

# The Rest

| | | |
|---|---|---|
| In Enterprise mode allow the modification of the office an advisor has been assigned to. | | Base |
| iPhone software application to be able to have similar to what is available for Palm users. | | Other |
| Integrate with XRAE - Xpress Risk Assessment Exchange | | Integration |
| When we enter info in the Proposal tracking tab for nursing home benefits for an insured it automatically assumes that we want same in the HOME care side. We type in stuff twice all the time in the tab | | Advisor |
| 64 Bit capability to run SmartOffice on a 64 bit computer. | | Other |

# 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…

More INFO at www.ezdata.com/bga

# Next BGA Webinar May7th

## Marketing Series: BGA Use of SmartOffice's Opportunities Module

Marlon Urias

**5.07.09 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

**Direct phone: 404-486-9866**

***Thank you for your time and your business.***





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