

## AMS AfW Session Descriptions

Thursday, March 12

2:00 p.m. - 3:15 p.m.

**Course #3010      AMS AfW**  
**Getting Your Data Ready for Migration to AMS 360**

Level: ALL      Target: ACCT OM SA

You're ready for the migration to AMS 360...but how about your data? Learn what you'll want to clean up or modify before your live date. What data will migrate? What won't? We will discuss new setup and security decisions, and show you how to successfully enter the migration path.

**Course #3011      AMS AfW**  
**Marketing With AMS AfW**

Level: INT/ADV      Target: OM PR SA

Did you know you can use AMS AfW to grow your business? Come learn how to use AMS AfW to create marketing campaigns and use your existing system data to identify cross-sell opportunities.

**Course #3050      BenefitPoint**  
**Main Session - Product Update**

Level: ALL      Target: ALL

Find out what's coming in BenefitPoint—from product and strategy news to service initiatives and technology upgrades. Come get a glimpse of the future right here.

**Course #3060      Executive Briefing**  
**Hiring and Firing - The Right Way**

Level: ALL      Target: ALL

This session will give you a clear understanding of labor laws as they relate to the hiring process, managing and disciplining employees, and terminations. You'll learn the right ways to both interview and terminate employees, avoiding actions that may be considered as harassing or discriminating.

*Jim Schulist, Schulist Interests Inc.*

*Mary Schulist, Schulist Interests Inc.*

**Course #3061      Executive Briefing**  
**First-Rate Training Program for Producers**

Level: ALL      Target: ALL

Learn from someone in the trenches as this AMS Sagitta user shares her proven training program for producers, beginning with college internships. You'll leave with ideas on how to create your own program. Topics include: recruiting tools, sales training, technical learning and application, culture orientation, coaching models, and how to fund this investment.

*Kris Manning, Holmes Murphy & Associates*

**Course #3062      Executive Briefing**  
**Future Agency**

Level: ALL      Target: ALL

The world is changing and will continue to change at a rapid pace. Are you ready for the future? Find out how technology, human resources, changing needs, and changing buying habits will create three distinct agency models in the not-too-distant future.

*Larry G. Linne, President, Sitkins Group Inc.*

## AMS AfW Session Descriptions

### Course #3070      **AMS Product Demo** **New Features in PL Rating**

Level: ALL    Target: ALL

Check out the new features added to SilverPlume's PL Rating product in the last year to make it the most effective, new business premium comparison tool. Come see how you can quote more business in less time.

### Course #3080      **Connectivity** **REAL Tools to Improve Your Bottom Line**

Level: ALL    Target: ALL

Learn how Real-Time Connectivity brings value to your agency and measurably increases productivity. Find out what's involved in going real-time, and how to gauge your potential returns.

### Course #3090      **IT** **Managing Your Virtual Environment**

Level: TECH    Target: IT OM

Learn from other IT pros as they discuss the practical applications of managing a virtual environment. They'll explain the best use of your existing equipment, what kind of cost savings to expect and the challenges—and benefits—of going virtual.

PREREQUISITE(S): Basic Understanding of a Virtual Environment

**3:30 p.m. - 4:45 p.m.**

### Course #3110      **AMS AfW** **Ready, Set, Go**

Level: ALL    Target: ALL

Migrating to AMS 360? Attend this session to get a glimpse of the newest AMS Migration Training plan. This class is a must to make sure you and your staff will be ready to go.

### Course #3111      **AMS AfW** **Specialty Forms for Specialized Agencies**

Level: INT    Target: ALL

Learn how to create the specialty forms you need in this power-packed session for specialized agencies. We'll cover specialty lines form letters, application forms and merge field considerations.

### Course #3150      **BenefitPoint** **Hot Topics in the Benefit Industry**

Level: ALL    Target: ALL

The benefits industry is constantly changing. Come find out the latest industry trends—and how these will impact your business—at this informative session.

### Course #3151      **BenefitPoint** **Why Use BenefitPoint as Your Management System?**

Level: ALL    Target: ALL

Is BenefitPoint right for you? Find out here. Come see first-hand how BenefitPoint leverages your data and helps you improve your business. Find out how the system gives you instant access to client information, enables you to benchmark more easily, track data and income, and provide employee communication tools.

## AMS AfW Session Descriptions

### Course #3160      Executive Briefing eDiscovery

Level: ALL      Target: ALL

The judicial system is catching up with the electronic age. New Federal Rules of Civil Procedure related to eDiscovery are in effect. How do these impact your agency? Join us to find out some practical advice on how to stay compliant in an ever-changing e-environment.

### Course #3161      Executive Briefing Learn to Speak Your Customer's Language

Level: ALL      Target: ALL

Get a first-hand look at the Path Elements Profile (PEP) personality tool, which enables you to recognize your customers' preferred communication style and way of doing business. By understanding how your customers make decisions, respond to information and their motivating factors, you can increase revenue and strengthen long-term customer relationships.

*Lane Henderson, Lane Henderson Communications*

### Course #3162      Executive Briefing What To Do With the "Real Time" You've Saved

Level: ALL      Target: ALL

Discover how to use real-time transactions to gain more business with your current customers, without hiring extra salespeople. You'll learn how to change your staff's processes to manage these new procedures and make the paradigm shift in time usage to take full advantage of all the "Real Time" you have saved.

*Jerry D. Fox, James M. King & Associates*

### Course #3170      AMS Product Demo Take AMS Producer Plus to New Heights

Level: ALL      Target: ALL

Learn how your agency can use AMS Producer Plus to get into other markets and increase your organic growth.

### Course #3180      Connectivity What's REALLY Coming That Will Push Your Buttons (R)

Level: ALL      Target: ALL

What is really new in the world of connectivity? We'll tell you all about it. Topics include: Web services, download, download certification, claims, alerts and activity notes, tools, commercial lines application upload and the book roll tool. Find out the latest here.

### Course #3190      IT Podcasting for the Agencies

Level: BASIC      Target: ALL

Learn how to mobilize your agency training with Podcasts. We'll discuss how to best communicate beyond the "walls" of your agency and how to disseminate the broadcast to multiple devices and types.

## AMS AfW Session Descriptions

Friday, March 13

9:45 a.m. - 11:00 a.m.

**Course #4010      AMS AfW**  
**Preview AMS 360 Accounting**

Level: BASIC Target: ALL

Compare and prepare! We'll compare the AMS 360 Accounting workflows side-by-side with AMS AfW functions. You'll see workflow and navigational differences, as well as additional functions available with AMS 360.

**Course #4011      AMS AfW**  
**Becoming a Power User**

Level: INT Target: ALL

What does it take to become a power user? Attend this session and learn the tips and tricks you need to push your AMS AfW system to the max.

**Course #4050      BenefitPoint**  
**Introduction to Operational Reporting**

Level: BASIC Target: CSR PR

The right operational reports can help you run your agency more efficiently and get the business intelligence you need. Learn how to generate activity and sales opportunity reports, and use these to identify outstanding tasks; how to create contact reports for mail merge; and how to run data quality reports, too.

**Course #4051      BenefitPoint**  
**Reporting: How Firms Leverage Data**

Level: INT/ADV Target: OM PR SA

How are other agencies using business intelligence? During this interactive class, our panel will explain how they mine specific agency data and how they customize reports to get the information they need. They'll answer your questions, and listen to your input. It's a session where everyone learns from each other.

PREREQUISITE(S): Reporting Knowledge

**Course #4060      Executive Briefing**  
**The Power of an Effective Second-in-Command**

Level: ALL Target: ALL

Many CEOs have so much "noise" going on in their lives and agencies that they lose effectiveness and get more frustrated by the day. Learn the Ten Principles that can "make the noise go away" through the use of an effective second-in-command.

*Larry G. Linne, President, Sitkins Group Inc.*

## AMS AfW Session Descriptions

### Course #4061 Executive Briefing

#### Agency Value: Special Factors

Level: ALL Target: ALL

What do you need to know NOW to optimize agency value in light of potential tax law (and other) changes following the 2008 election? Learn what affects agency value, including terms and sale structure, as well as how an internal succession compared to a third-party sale impacts worth.

*Larry Morrison, Business Transition Network Inc.*

### Course #4062 Executive Briefing

#### Manage Beyond Your Renewals

Level: ALL Target: ALL

Discover the behaviors and best practices used by the leading independent agencies to create value in their organizations. You'll learn some key statistic and metrics—and see how you measure up.

*Brian Deitz, Reagan Consulting*

### Course #4070 AMS Product Demo

#### Are You as Compliant as You Need to Be?

Level: ALL Target: ALL

State regulations regarding agent licensing and compliance are constantly changing. Failure to comply can cost you money and your reputation. But compliance doesn't have to be difficult and it doesn't need to take a lot of time if you have the right tools. Come see those tools here.

### Course #4071 Users' Group Product Demo

#### NEW Services for Commercial Lines

Level: ALL Target: ALL

Hear how three agents/brokers met the needs of high-volume accounts like contractors, truckers, condo associations and municipalities, and dramatically reduced their workloads in the process. They'll discuss how they've leveraged AMS Users' Group's endorsed product CSR24 and other technology to continue to expand their business even in this uncertain economy.

### Course #4072 Users' Group Product Demo

#### Spam - Now It's Serious

Level: ALL Target: ALL

Attendees will get an overview of today's leading methods for protecting their business and people from Internet pollution including spam, viruses, and more importantly identity theft. These threats pose more significant risks today than ever with spammers becoming more sophisticated than in years past. We'll discuss the different types of e-mail, various methods of cyber attacks and the scope of these risks, allowing you to gain an understanding of the potential impact to the health of their organizations, as well as solutions from AMS Users' Group endorsed product vendor AppRiver.

### Course #4080 Connectivity

#### Best Practices in the REAL World for the Exec

Level: ALL Target: ALL

Come learn to be the best. We'll discuss best practices and show you how to implement these workflows in your agency. Learn about the tools that can help you, including the Best Practices Guide.

## AMS AfW Session Descriptions

**Course #4090 IT**  
**Technology - Managing the Policies**

Level: ALL Target: IT OM SA

Studies show how quickly personal use of the Internet and e-mail can zap productivity and even bring E&O risks. How do you protect your agency? Our panel will discuss their experience in setting up Internet, e-mail and mobile device usage policies and the best method of enforcement.

11:15 a.m. - 12:30 p.m.

**Course #4110 AMS AfW**  
**Preview AMS 360 CSR Workflows Side-by-Side**

Level: ALL Target: ALL

During this session, you'll see the AMS 360 CSR workflows compared, side-by-side, to those in AMS AfW. We'll compare workflows, navigational differences and showcase some additional functions available in AMS 360.

**Course #4111 AMS AfW**  
**Internal Auditing**

Level: INT Target: OM

It's 10:00 a.m. Do you know what your staff is doing? Find out how to monitor the overall staff performance. The best quality check around is already in your system. We'll discuss the internal auditing of accounting, CSRs and producers. Don't miss it!

**Course #4150 BenefitPoint**  
**The Basics of a Broker Admin**

Level: BASIC Target: BA

Learn how to add and manage new hires and terminations, maintain Account Teams, and customize the applications to meet your business needs. Be an Office Champion!

PREREQUISITE(S): Broker Admin Role in BenefitPoint

**Course #4151 BenefitPoint**  
**Plan Management: All Plans Must Come to an End**

Level: INT/ADV Target: CSR PR

Come learn how to manage and monitor plans for more efficient reporting and more reliable data integrity. We'll show you advanced plan management features—including how to capture origination reason, access plan history, cancel and reinstate across accounts and perform mass renewals.

**Course #4160 Executive Briefing**  
**We Can Impact Where Agency Technology Goes**

Level: ALL Target: ALL

Join Industry Affairs experts for an interactive "Progress Report," and see how your voice truly does make a difference in the work being discussed, planned, and executed with The AMS Users' Group, AMS, carrier partners and the industry. Bring your "Key Carriers" to this session. It's all about cooperation.

*Industry Affairs Committee*

## AMS AfW Session Descriptions

### **Course #4161 Executive Briefing Structuring a Win/Win/Lose Sale**

Level: ALL Target: ALL

Changing tax laws will affect the sale of your agency. Come learn the most important considerations and key tax control tools you'll need when structuring an agency sale. Almost all agency sales commanding a premium price will involve an "earn-out." Find out the various ways to structure an earn-out, and its benefits, too.

*Larry Morrison, Business Transition Network Inc.*

### **Course #4162 Executive Briefing Does Your Team Have What It Takes to Win?**

Level: ALL Target: ALL

Winning teams operate at peak performance, with high productivity, low turnover and minimal stress – all while capitalizing on the unique strengths of each of their players. Course participants will be introduced to the Path Elements Profile personality and communications tool, designed to transform your agency team into a winning team.

*Lane Henderson, Lane Henderson Communications*

### **Course #4170 AMS Product Demo Proposals in AMS Producer Plus**

Level: ALL Target: ALL

Learn how to use the new proposal system in AMS Producer Plus, as well as the best way to create and use custom Proposals. We will review common problems and solutions, and walk you through the process of creating a custom proposal, and adding it to the system.

### **Course #4171 Users' Group Product Demo Business as Usual. No Matter What.**

Level: ALL Target: ALL

Business Continuity Planning is critical for insurance agents. Find out how to easily develop a customized program for your agency, and how AMS Users' Group endorsed product, ReadySuite, provides you access to the four key elements of recovery: power, space, technology and connectivity within 48 hours of any business interruption.

### **Course #4172 Users' Group Product Demo Hosted Microsoft Exchange E-mail**

Level: ALL Target: ALL

Attendees will learn how to access Microsoft's state of the art e-mail system to improve agency productivity using a pay-as-you-go model minimizing their financial risk. Understand the benefits of the rich messaging functionality of Microsoft Exchange without the administrative or technical burden of running it in-house. Hosted Exchange benefits include shared calendars, contacts, public folders and more; you can access your information regardless of your location, in your office via your LAN and Microsoft Outlook, remotely over the web with Outlook Web Access (OWA) or from your mobile device, providing users with instant access to all of their information, improving business communications and productivity. Find out what this AMS Users' Group endorsed product can do for you.

## AMS AfW Session Descriptions

### Course #4180      **Connectivity**

#### **REAL Carrier Connections**

Level: ALL      Target: ALL

Join us at this open forum of agents and carriers discussing carrier implementations of real-time. We'll talk through roadmaps and roadblocks—and how to work better together.

### Course #4190      **IT**

#### **Mobile Security**

Level: TECH      Target: IT

Mobility brings freedom—and new security threats. Learn about the new threats in the mobile environment, including security compromises, data theft—as well as the best way to secure the mobile devices in use at your agency.

2:00 p.m. - 3:15 p.m.

### Course #4210      **AMS AfW**

#### **Preview Basic AMS 360 Invoicing Side-by-Side**

Level: ALL      Target: ALL

Here's your opportunity to compare the invoicing process in AMS AfW to that in AMS 360. We'll compare the very different workflow and navigation – click by click. We will also demonstrate additional functions available only on AMS 360.

### Course #4211      **AMS AfW**

#### **Company and Producer Payables**

Level: INT      Target: ACCT

Learn how to set up and process your producer and company payables. We'll show you how to build statements, issue payments and make corrections easily.

PREREQUISITE(S): Basic Accounting Knowledge

### Course #4250      **BenefitPoint**

#### **RTM: Commission Tracking**

Level: ALL      Target: ACCT

Learn how to manage payee records and plan splits; enter and post commission statements; and create reports. We'll also explain how to upload electronic statements for a carrier—to save time while improving productivity.

### Course #4251      **BenefitPoint**

#### **Event-Driven Workflow: Automating Your Processes**

Level: INT/ADV      Target: BA

Learn from our panel and other users at this interactive session. Find out how to create templates that automatically generate Activity Log Records based on specific events. See how other firms benefit from automating workflows when adding accounts, creating requests and adding plans.

PREREQUISITE(S): Broker Admin Role in BenefitPoint

### Course #4260      **Executive Briefing**

#### **AMS Services/Vertafore Town Meeting**

Level: ALL      Target: ALL

## AMS AfW Session Descriptions

Attend this interactive meeting to hear what AMS Services/Vertafore has been working on and what projects are planned for the future. Give them your input on what they did great this year or what needs improvement. Hear from AMS Service's executive team as they tell you about the company direction for 2009 and beyond.

*Euan Menzies, AMS Services*

### **Course #4261 Executive Briefing The Key to Increasing Income and Protecting Wealth - Part 1**

Level: ALL Target: ALL

During this two-part session, you'll learn how to protect your business and personal assets from litigation. We'll discuss proper entity structuring, tax reduction and capital gain elimination. Gain the freedom to run your business without worrying about protecting your hard-earned income from legal predators.

*G. K. Mangelson, National Foundation for Tax Planning and Asset Protection*

### **Course #4262 Executive Briefing E&O Claim Case Study**

Level: ALL Target: ALL

Learn from a real-world case study. We'll look at the various AMS products and show you how the proper use of these tools and the right workflows can significantly reduce the agency's E&O exposure. We'll also discuss how to communicate this need to your staff.

*Curtis Pearsal, Utica National Insurance Group*

### **Course #4270 AMS Product Demo AMS Producer Plus Integration**

Level: ALL Target: ALL

Learn how to transfer submission information between AMS systems and AMS Producer Plus. We'll discuss how to configure integration, as well as Importing and Exporting data. You'll discover how to fill out forms, what to do when the Export reports a problem, and how to use imported data in Proposals.

### **Course #4271 Users' Group Product Demo Employee Internet Management**

Level: ALL Target: IT OM SA

Learn what Panoptech, The AMS Users' Group endorsed Employee Internet Management device can do, with a full product demo. We'll discuss the potential risks associated with Internet abuse, including Internet security, and show you how monitoring activity can decrease risk and increase productivity.

### **Course #4280 Connectivity Catch the REAL Wave**

Level: ALL Target: ALL

Learn what the industry leaders are doing for you and how you can get involved. We'll discuss The AMS Users' Group Industry Affairs and Connectivity Committees—and how these are interacting with ACT, AUGIE, ACORD and more.

## AMS AfW Session Descriptions

**Course #4290 IT**  
**Becoming a Change Agent**

Level: BASIC Target: ALL

Change happens—but the question is, how do you get everyone on board? During this session, you'll learn the importance of managing change, how to track the emotional side of change amongst your staff—and how to turn your employees into change advocates.

**3:30 p.m. - 4:45 p.m.**

**Course #4310 AMS AfW**  
**Required Setups in AMS 360**

Level: ALL Target: ACCT OM SA

There are new "required" setups in AMS 360, for new functionality we don't have in AMS AfW. We'll show you how to handle these details including important billing considerations. Attend this session and be prepared for what you need to have in place when you go live.

**Course #4311 AMS AfW**  
**Advanced Invoicing**

Level: ALL Target: ACCT CSR

This class focuses on your more challenging billing scenarios. We'll discuss multiple-entity billing, subscription billing and premium financing. Take your invoicing knowledge to the next level.

**Course #4350 BenefitPoint**  
**Connect Through Web Services**

Level: ALL Target: ALL

Web services is a low-cost development alternative for integration with your internal and client-facing systems. Find out what this open architecture can do for you. You'll learn how to retrieve, insert and update real-time BenefitPoint details and easily import this data into other systems.

**Course #4351 BenefitPoint**  
**Coding Against Web Services**

Level: TECH Target: ALL

During this interactive session, you'll learn how to develop code that can help you find, update and insert information into BenefitPoint, and extract data from the system for use in others. You'll have the opportunity to ask questions and share your ideas with other users.

PREREQUISITE(S): Development Knowledge

**Course #4360 Executive Briefing**  
**Old Duds/Young Studs**

Level: ALL Target: ALL

As new young Producers come into agencies, they bring the "Generation X" culture with them. How does this new "culture" mix in with the historic "mature" sales environment? Join the panel presentation and see what new opportunities arise out of these new dynamic agencies!

## AMS AfW Session Descriptions

**Course #4361 Executive Briefing**  
**The Key to Increasing Income and Protecting Wealth - Part 2**

Level: ALL Target: ALL

This is a continuation of Course #4261 - The Key to Increasing Income and Protecting Wealth - Part 1.

PREREQUISITE(S): Attending Course #4261

*G. K. Mangelson, National Foundation for Tax Planning and Asset Protection*

**Course #4362 Executive Briefing**  
**Crossing the Divide - Multi-Generational**

Level: ALL Target: ALL

Doing business with the diversity of age, values, and beliefs of our associates requires understanding, knowledge, and the ability to adapt. Learn what it takes to successfully communicate across the generational divide to build teamwork and agent relationships.

*Emily Huling, Selling Strategies Inc.*

**Course #4370 AMS Product Demo**  
**Business Convergence (R)**

Level: ALL Target: ALL

Today's competitive marketplace demands that your business transactions, records of those transactions and transparency into your operations all work together. Come discover the necessity of unifying these key components of business success within and beyond the agency walls, and learn how to bring content management, workflow and business intelligence together.

**Course #4380 Connectivity**  
**Best Practices in the REAL World for CSRs**

Level: ALL Target: CSR

Come learn the best practices and workflows to implement in your agency. Find out how to use all the tools we have available and how to utilize the Best Practices Guide and see great results.

**Course #4390 IT**  
**SharePoint**

Level: ALL Target: ALL

Learn the differences between SharePoint Services and portal server. This scalable new tool simplifies collaboration, forms creation, and eliminates duplicate entry. We'll discuss possible migration, security, and administration issues, and give you the information to help you make the right decision for your agency.

### Saturday, March 14

8:00 a.m. - 9:15 a.m.

**Course #5010 AMS AfW**  
**Understanding Security Setups in AMS 360**

Level: BASIC Target: ALL

Security is one of the hottest topics for migrating agencies today. Join us for a look at security in AMS 360. We'll show you the newest setups in the latest version, and provide customization tips for your employee Group Settings.

## AMS AfW Session Descriptions

### Course #5011 AMS AfW

#### **Billing Corrections**

Level: INT Target: ACCT CSR

Come learn the "undo" of invoicing. We'll cover corrections such as billing type, change of company or personnel and more. Join us and learn how to make billing boo-boo's disappear!

PREREQUISITE(S): Basic AMS AfW Billing Knowledge

### Course #5050 BenefitPoint

#### **Activity Log: Tracking Client Issues**

Level: BASIC Target: ALL

Find out how to use BenefitPoint to track client conversations and requests, document the steps taken and resolutions, and also record the time spent managing these individual accounts. You'll learn how to use this information to manage your staff, generate reports and make it accessible in one centralized place.

### Course #5051 BenefitPoint

#### **Acquisitions: Simplifying the Data Transition**

Level: INT/ADV Target: BA OM

Learn how to enter newly acquired accounts, plans and carrier contact information in BenefitPoint. We'll show you how to set up your users, payees and account teams; define splits on new policies and the best way to train new users.

### Course #5060 Executive Briefing

#### **Ins Prem Fin – A Benefit to Your Agency**

Level: ALL Target: ALL

During this session we will discuss the benefits of utilizing premium financing as a quality, value added service for you and your clients. Learn how premium financing can help your agency Soar to New Heights.

*Luther Grafe, COO & EVP, BankDirect Capital Finance*

*Greg Boots, President, BankDirect Capital Finance*

### Course #5061 Executive Briefing

#### **Producer Recruiting, Validation & Training**

Level: ALL Target: ALL

This session will explain how to bring real sales talent to your agency from outside the industry. We'll also discuss compensation plans that work, and what to do after your candidate says, "yes" – including training, performance monitoring and tips to achieve the greatest success in the least amount of time.

*Arthur Betancourt, Marsh, Berry & Co.*

### Course #5062 Executive Briefing

#### **Selling From the Inside**

Level: ALL Target: ALL

Come learn the tips and techniques you need to grow your business from the inside out. We'll explain what customers want and need from their CSR, how to create trust relationships, and techniques for selling additional coverages.

*Emily Huling, Selling Strategies Inc.*

## AMS AfW Session Descriptions

### **Course #5070      AMS Product Demo** **Using Benefits to Boost Your Business**

Level: ALL    Target: ALL

Serving your clients' Benefits needs can help you through the soft market and beyond. It can be an important component of commercial customer retention, as well as a significant source of additional revenue. Learn about Best Practices to help you establish or grow your agency's Benefits business.

### **Course #5071      Users' Group Product Demo** **Customer Self Service – An Economic Windfall for Everyone**

Level: ALL    Target: ALL

Take a closer look at CSR24 and how it addresses many agent's needs to reduce the cost of the growing Certificate and Auto ID "paper" that policyholders are requesting. Also learn how this process not only dramatically reduces cost, but also improves service and improves your client's servicing experience with your organization. When was the last time you could purchase a solution, save money and improve your client relationship? Don't miss this workshop and see how this AMS Users' Group's endorsed product works. It will be information well worth bringing back from conference.

### **Course #5072      Users' Group Product Demo** **Small Business Owners Shop for Insurance Online**

Level: ALL    Target: ALL

Small business owners are turning to the Internet to find insurance. With the industry's only online Business Application, AMS Users' Group endorsed product NetQuote has unique data regarding an online consumer versus business owner. You'll learn tips and techniques on how to sell these prospects, plus you'll understand the value of filtering your leads.

### **Course #5080      Connectivity** **What's REALLY Coming That Will Push Your Buttons (R)**

Level: ALL    Target: ALL

See Course #3180 for class description.

### **Course #5090      IT** **Outlook 2007 – Part 1**

Level: INT    Target: ALL

Back by popular demand—now expanded to two sessions. Learn what's new with Outlook 2007 and how to use this critical tool for more effective task management. Come get control over the hours in your work day. It starts by signing up for this course!

PREREQUISITE(S): View the Podcast and Experience in Microsoft Outlook

**9:30 a.m. - 10:45 a.m.**

### **Course #5110      AMS AfW** **Direct Bill Options in AMS 360**

Level: ALL    Target: ALL

During this session for migrating agencies, you'll learn all about direct bill invoicing setups in AMS 360. Attend this class for a discussion of these very important considerations, and gain an understanding of the pros and cons of each.

## AMS AfW Session Descriptions

**Course #5111      AMS AfW**  
**Advanced Personal Lines Workflows**

Level: ADV    Target: ALL

If you want to learn the workflows for Personal Lines in AMS AfW, then this is the place to be! You'll discover how to efficiently handle new business and renewals. We'll also discuss how to handle endorsements and cancellations. Don't miss it!

**Course #5150      BenefitPoint**  
**Partners for Your Client Needs**

Level: ALL    Target: ALL

Learn about BenefitPoint's integration with client communication tools and third-party enrollment vendors. Offer your customers more with less effort. BenefitPoint makes it easy.

**Course #5151      BenefitPoint**  
**Partnering With Carriers on BenefitPoint**

Level: ALL    Target: CSR PR

Learn how to leverage online responses to create client presentations with your carrier and partner vendors. We'll show you how to customize communications for carriers, and answer your specific questions at this lively panel discussion.

PREREQUISITE(S): RFP/Renewal User

**Course #5160      Executive Briefing**  
**From Protector to Enabler**

Level: ALL    Target: ALL

Find out what's being done in the industry to protect electronic interactions with agents through encryption. Hear about innovative single sign-on technologies in the works that will simplify agent access to the numerous carrier portals used daily plus improve security of those interactions.

*Jim Rogers, The Hartford*

**Course #5161      Executive Briefing**  
**Generations & Genders - Getting Everyone to Play**

Level: ALL    Target: ALL

Gen X, Gen Y, Baby Boomers and G.I.'s. Many workplaces are trying to get four different generations to work together. The Gen X and Gen Y's don't see authority the way the Boomers and G.I.'s did. Come learn how to get everyone to play nice together. Oh, and make money.

*Jeff Gaines, WiseGuide Training LLC*

**Course #5162      Executive Briefing**  
**The Acquisition Strategy**

Level: ALL    Target: ALL

Learn what agencies are looking for in an acquisition candidate? Learn the methodology behind the acquisition process from those agencies who have "been there, done that." Whether you want to acquire other agencies or be acquired yourself, this session is for you.

*Jennifer Hallam, The IMA Financial Group*

*Jennifer McDonald, ABD Insurance Services Inc.*

*Roy Riley, Peel & Holland*

## AMS AfW Session Descriptions

### Course #5170      **AMS Product Demo** **Business Convergence (R)**

Level: ALL    Target: ALL

Today's competitive marketplace demands that your business transactions, records of those transactions and transparency into your operations all work together. Come discover the necessity of unifying these key components of business success within and beyond the agency walls, and learn how to bring content management, workflow and business intelligence together.

### Course #5171      **Users' Group Product Demo** **Recognizing E&O Issues & Recommendations**

Level: ALL    Target: ALL

Learn how to develop procedures within three-to-four months, recognize E&O Issues and eliminate inconsistencies in all 70 P&C procedures using this AMS Users' Group endorsed product by The Grace Bauer Group Inc.

### Course #5172      **Users' Group Product Demo** **Managing CSRs**

Level: ALL    Target: ALL

Why do CSRs act the way they do, and can you "fix" them? This interactive session discusses your strengths, communication and management styles and what to look for in your current employees. All attendees will complete an Omnia Profile, an AMS Users' Group endorsed product, to be reviewed in class.

### Course #5180      **Connectivity** **AMS TransactNOW REALy Grown-up**

Level: ALL    Target: ALL

AMS TransactNOW is no longer just a policy look-up tool. See how the more mature AMS TransactNOW product can benefit your agency—and learn about all its new features.

### Course #5190      **IT** **Outlook 2007 – Part 2**

Level: INT    Target: ALL

See Course #5090 for description.

PREREQUISITE(S): Attending Course #5090, View the Podcast and Experience in Microsoft Outlook

11:00 a.m. - 12:15 p.m.

### Course #5210      **AMS AfW** **True Confessions of a Migrated Agency**

Level: ALL    Target: ALL

This panel of agents just recently migrated to AMS 360. You'll hear their candid input on what they did, what it takes to have a good migration, and what they would have done differently. Learn from their experience at this open forum for training and preparation. Bring your migration questions.

### Course #5211      **AMS AfW** **Advanced Commercial Lines Workflows**

Level: INT    Target: ACCT CSR PR

Learn the right way—and the most efficient way—to process cancellations, reinstatements and endorsements.

## AMS AfW Session Descriptions

**Course #5250      BenefitPoint**  
**Customizing to Meet Your Firm's Needs**

Level: ALL    Target: BA

Let our panel show you how to use customizations to your agency's benefit. You'll see how they use current data standards to create custom fields; disable their existing fields and identify personal health information and control carrier lists for adding and renewing plans. Get insights from agency experts here.

**Course #5251      BenefitPoint**  
**Leveraging RTM Data**

Level: INT/ADV    Target: ACCT

Learn from customers how the current revenue tracking and management (RTM) reports are utilized for forecasting and reconciliation. Explore current reporting options and identify future needs. This is an interactive panel discussion.

PREREQUISITE(S): RTM User

**Course #5260      Executive Briefing**  
**Best Practices, Workflows, & Information (R)**

Level: ALL    Target: ALL

Laura Nettles, creator of The Best Practices Guide to Agency Business Processes and Information Management, will explain how to turn up the heat on your technology implementation. Learn how to assess your current technology and workflows, gauge your system's impact on profitability and productivity; and monitor effectiveness of your workflow.

*Laura Nettles, Nettles Consulting*

**Course #5261      Executive Briefing**  
**What's Great in 2009 (R)**

Level: ALL    Target: ALL

This session will explore the latest tools, websites and processes agencies can use to increase revenue and reduce expenses. You will learn how to use new communication tools like Wiki's, Blogs, Facebook, and Text messaging to engage your prospects, clients and employees. Plus, we'll discuss the latest productivity tools.

*Steve Anderson, The Anderson Agency Report (TAAR)*

**Course #5270      AMS Product Demo**  
**Removing Roadblocks to Revenue**

Level: ALL    Target: ALL

The road to writing new business is paved with rocks and other barriers. It can be complicated to navigate, but we have shortcuts and tools to help. Find out how to remove the common roadblocks related to producer on-boarding and compliance.

**Course #5271      Users' Group Product Demo**  
**QueryPlus - The Basics**

Level: ALL    Target: ALL

Learn the scope of the different types of reports available from QueryPlus, an AMS Users' Group endorsed product. We'll show you how to find the data you want for different reports and how to format like a pro. You'll leave with product "how-to's" to help you when you get back home.

## AMS AfW Session Descriptions

### Course #5280      **Connectivity** **The REAL Power of Change (R)**

Level: ALL      Target: ALL

ACORD's updated Power of Change is built around the five points: focusing on the customer, finding the costs, getting the cost out, streamlining the workflow and ensuring results. Come away with basic tools to implement change in your agency.

### Course #5290      **IT** **Exchange Server (R)**

Level: INT      Target: IT

This session focuses on using Exchange with Outlook 2003 or later. We'll show you how to setup Exchange to work across the Internet, as well as Public Folders. You'll learn mailbox management tips and suggestions. We'll also discuss Exchange Journaling and the best way to create an e-mail archive.

**1:45 p.m. - 3:00 p.m.**

**Special Dedicated Time in Exhibit Area for AMS AfW Users**

**3:15 p.m. - 4:30 p.m.**

### Course #5410      **AMS AfW** **Online or In-House for AMS 360**

Level: BASIC      Target: IT OM SA

You are migrating to AMS 360...should you go "Online" or stay "In-House?" Come and listen to agents who have made the decision as they discuss why they chose to go "in" or "on." The discussion will include hosting; bandwidth, connectivity and equipment; as well as how to handle third-party applications.

### Course #5411      **AMS AfW** **Forensic Accounting**

Level: ADV      Target: ACCT OM

Get the magnifying glass out and look deep into the detail of your accounting entry. We'll show you how to analyze financial reports, identify the errors and delve into the depths of your sub-ledger.

### Course #5450      **BenefitPoint** **Share Tips/Tricks for Implementation & Usage**

Level: ALL      Target: ALL

Share your insight and learn from other agents. Our topic is how to best implement and utilize BenefitPoint. We'll discuss the best way to get started, how to define data standards and manage accounts, plus how to enter plans and create requests. Bring your questions, your tips and your enthusiasm.

### Course #5451      **BenefitPoint** **Feedback Forum**

Level: INT/ADV      Target: ALL

Come share your comments and suggestions on how to make BenefitPoint work better for you. This open forum provides you with the opportunity to discuss your feedback with the experts who make it happen.

## AMS AfW Session Descriptions

**Course #5460 Executive Briefing  
Building Value Through Service Staff Management**

Level: ALL Target: ALL

This presentation will examine the interrelationship between the production staff and service staff. We will discuss the appropriate way of setting goals for the service staff and review CSR productivity data for both low-growth and high-growth agencies. Three ways to improve CSR productivity will also be revealed.

*Christopher Darst, Marsh, Berry & Co.*

**Course #5461 Executive Briefing  
Conversations We'd Rather Eat Glass Than Have**

Level: ALL Target: ALL

"Please show up on time," " please spend less time socializing," " please stop running my agency into the ground"—these are the conversations we need to have, but love to avoid. Learn how to make these talks easier and perhaps avoid needing to have them in the first place.

*Jeff Gaines, WiseGuide Training LLC*

**Course #5470 AMS Product Demo  
Grow Your Business With SilverPlume**

Level: ALL Target: ALL

Win new business and retain current clients with SilverPlume Information Solutions' products. Learn how to differentiate your agency, equip staff with tools to understand risks and coverages, provide more effective customer service, and create additional connections to clients and prospects.

**Course #5480 Connectivity  
REAL Commercial Lines Download**

Level: ALL Target: ALL

Commercial Lines Download is new, improved and better than ever. Come to this class to find out what's changed, and how the process works with AMS, the carriers, and the agents. We'll tell you about tools that can help with workflow and what's coming next.

**Course #5490 IT  
Disaster Recovery Panel**

Level: ALL Target: ALL

What would you do if the unexpected happens? Hear how other agencies have recovered from a disaster, what they did before and after the critical event—and what they would have done differently. Be ready for anything by taking this class.