

Executive Briefing Session Descriptions

Thursday, March 12

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

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.

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.

Executive Briefing Session Descriptions

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 #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.

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

Executive Briefing Session Descriptions

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.

Friday, March 13

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

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.

Executive Briefing 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.

Executive Briefing 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 #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 makes 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

**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.

Executive Briefing Session Descriptions

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.

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.

Executive Briefing Session Descriptions

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 #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

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

Executive Briefing Session Descriptions

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.

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 #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.

Executive Briefing Session Descriptions

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!

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

Executive Briefing Session Descriptions

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 #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.

Executive Briefing Session Descriptions

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.

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

Executive Briefing Session Descriptions

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

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

Executive Briefing 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 #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.

Executive Briefing Session Descriptions

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.

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.

Executive Briefing Session Descriptions

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 BenefitPoint Users

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

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.

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

Executive Briefing Session Descriptions

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.