

## AMS Sagitta Session Descriptions

Thursday, March 12

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

### Course #3040 AMS Sagitta

#### What's New (R)

Level: ALL Target: ALL

Stay on top of the latest AMS Sagitta buzz at this kickoff session. We will fill you in on the status of new releases, added functionality and some exciting new ways to use the system to soar to new heights.

### Course #3041 AMS Sagitta

#### Report Builder Dictionary: Maintenance – Part 1

Level: ADV Target: IT SA

Dictionary maintenance makes producing ad-hoc reports easier in Report Builder. We'll show you the dictionary and dictionary items—and how to format these for your agency's reporting needs. You'll learn to create correlatives, and gain a clear understanding of multi-valued attributes.

PREREQUISITE(S): Report Builder Experience, Understand AMS Sagitta Database Structure

### Course #3042 AMS Sagitta

#### Taking ODBC to the Next Level (Hands-On)

Level: ADV Target: ALL

Advance your knowledge at this advanced, hands-on class. You'll learn how to set up complex queries and query templates, ad hoc reports and more. Learn by doing and take your basic knowledge to the next level. This is not a class for beginners.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast, Basic ODBC Knowledge

### Course #3043 AMS Sagitta

#### Increasing AMS Sagitta Efficiencies

Level: BASIC Target: ALL

Get more done in less keystrokes. We'll show you some tips, tricks and shortcuts to help you get to what you need in AMS Sagitta much faster. A few keystrokes a day can be big timesavers!

### 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.*

## AMS Sagitta Session Descriptions

### **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.

### **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 #3140      AMS Sagitta** **Marketing: What are the Options?**

Level: BASIC    Target: ALL

Learn how to identify tracking options and report results using AMS Sagitta—or AMS Sagitta in conjunction with third-party products. Jump start your marketing efforts here.

## AMS Sagitta Session Descriptions

**Course #3141      AMS Sagitta**  
**Report Builder Dictionary: Maintenance – Part 2**

Level: ADV    Target: SA IT

In part two of this two-part session, we'll continue our discussion on dictionary maintenance.

PREREQUISITE(S): Attending Course #3041

**Course #3142      AMS Sagitta**  
**Performance Analyzer (Hands-On)**

Level: ADV    Target: ACCT IT OM SA

You've seen it demonstrated—now let's use it. Join us for the first-ever, hands-on Performance Analyzer session. You'll learn how to transform your data into a business analysis tool. You'll see the different ways to view your data; including comparative views. We'll also discuss reporting capabilities.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

**Course #3143      AMS Sagitta**  
**Word 2007 and the AMS Administrator**

Level: INT    Target: CSR SA

What's new in Word 2007? During this class we'll explain the differences between Word 2003 and 2007. You'll also learn how to use Word and AMS Administrator to create better, faster proposals.

PREREQUISITE(S): AMS Admin Experience & Proficiency With Microsoft Office

**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

## AMS Sagitta Session Descriptions

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.

## Friday, March 13

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

### **Course #4040 AMS Sagitta What's New (R)**

Level: ALL Target: ALL

See Course #3040 for class description.

## AMS Sagitta Session Descriptions

### Course #4041      **AMS Sagitta** **Accounting Personalization**

Level: INT    Target: ACCT

Personalization is the key to more efficient accounting. Come learn the impact of personalization on accounting and systems maintenance. We'll also talk about controlling results and techniques for keeping everything current.

PREREQUISITE(S): Agency Accounting Experience

### Course #4042      **AMS Sagitta** **Client Level Units at Risk (Hand-On) (R)**

Level: BASIC    Target: CSR SA

Learn what decisions you need to make and what personalization is needed for your users to have the most efficient workflows! Save them redundant data entry by having them enter units at risk at the client level and copy new units and/or changes to each affected policy.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

### Course #4043      **AMS Sagitta** **Personal Lines Round Table**

Level: ALL    Target: CSR

Real-life experiences; users helping users. Be a part of it all at this interactive round table. You'll have the opportunity to talk to Personal Lines CSRs in comparable-sized agencies about your daily challenges. Learn from each other and find new ways to make your life easier.

### 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 Sagitta 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 Sagitta 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 #4140 AMS Sagitta  
A Focus on FOCUS**

Level: BASIC Target: ALL

Okay, everyone—FOCUS! During this session, you'll discover all the resources available to help you resolve problems more quickly. We'll also go over the top FOCUS tickets and their resolutions, so you can be prepared.

**Course #4141 AMS Sagitta  
Accounting Communication: Push Me-Pull You**

Level: INT Target: ALL

Come learn how to reduce accounting discrepancies by improving communication between the business side and the accounting side of your agency. We'll also show you how to eliminate invoicing efficiencies, but understanding how what's done in one department can impact other departments and your overall financial reporting.

**Course #4142 AMS Sagitta  
Create Your Own User-Defined Fields and Pages (Hands-on) (R)**

Level: INT Target: CSR IT SA

Learn by doing at this informative session! Practice creating agency-specific pages and fields with an expert there to answer questions. You'll also discover how to integrate the data with eForms, AMS Word, Report Builder and more!

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

**Course #4143 AMS Sagitta  
Claims Round Table**

Level: BASIC Target: CSR OM SA

Come learn how your peers use AMS Sagitta in the claims process, and share your own stories in this interactive forum. We'll discuss third-party applications that can complement the workflow, and identify areas of the system that need more attention. It's all about users helping users.

**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

## AMS Sagitta Session Descriptions

### 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.*

### 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.

## AMS Sagitta Session Descriptions

### **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.

### **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 #4240      AMS Sagitta Coming Attractions - Part 1**

Level: BASIC    Target: ALL

Come hear about the newest functions of AMS Sagitta from the development experts! You'll learn the latest on updates, future enhancements and what to expect down the road. It's sure to be a sell out, so sign up early!

### **Course #4241      AMS Sagitta Direct Bill Reconciliation**

Level: INT    Target: ACCT

Save time by learning the new, automated way to reconcile your Direct Bill commission statements. PREREQUISITE(S): Agency Accounting Experience

### **Course #4242      AMS Sagitta Come See the Wizard of Certs and EPI (Hands-on) (R)**

Level: BASIC    Target: CSR

Come learn how to improve efficiencies by using Wizards to create certificates and EPI. We'll explain the new workflows and show you how to create tracking reports. And you can learn by doing. Take this class and become a whiz kid yourself.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

## AMS Sagitta Session Descriptions

### Course #4243      **AMS Sagitta**

#### **How Do You Do It Round Table**

Level: ALL      Target: ALL

This interactive round table gives you the opportunity to find out how your peers handle different situations in AMS Sagitta. Find out some proven, best practices. Learn how to solve your agency challenges—and help other users solve their own!

### 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*

### 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*

## AMS Sagitta Session Descriptions

### **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 #4340      AMS Sagitta Carrier Connectivity**

Level: INT    Target: ALL

Come to this session and hear about a new Book of Business Analysis tool, unattended download processing and more.

### **Course #4341      AMS Sagitta Accounting Database Structure**

Level: ADV    Target: ACCT

You can greatly improve report capabilities by understanding the file structure. Come to this class to learn that structure, accounting file relationships and some tools to use to manage your database more effectively.

### **Course #4342      AMS Sagitta Importing/Exporting Scheduled Data (Hands-on) (R)**

Level: BASIC    Target: CSR IT SA

## AMS Sagitta Session Descriptions

Learn by doing at this informative class. You'll practice importing and exporting policy and client schedule data; personalizing agency spreadsheets for import and export—all with an expert close-at-hand to check your progress as you go.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

### **Course #4343      AMS Sagitta** **IT Round Table**

Level: TECH    Target: IT SA

Join us at this interactive round table session, where you'll discuss recurring problems and solutions with other IT experts who have "been there and done that." You'll also find out the best ways to use FOCUS and learn how eCommunities can help you every day.

### **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!

### **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*

## AMS Sagitta Session Descriptions

**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 #5040 AMS Sagitta  
What's New: Third-Party Products**

Level: BASIC Target: ALL

Stay on top of the latest third-party products that work in conjunction with AMS Sagitta.

**Course #5041 AMS Sagitta  
Standard Reporting for Accounting**

Level: BASIC Target: ACCT OM

The question is, why recreate the wheel? We'll review the standard accounting reports in AMS Sagitta and show you how to better utilize the "canned" accounting reports in the system. We'll also discuss key accounting intervals.

PREREQUISITE(S): Agency Accounting Experience

## AMS Sagitta Session Descriptions

**Course #5042      AMS Sagitta**  
**Client Level Units at Risk (Hands-On) (R)**

Level: BASIC Target: CSR SA

See Course #4042 for class description.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

**Course #5043      AMS Sagitta**  
**Commercial Lines Round Table**

Level: ALL Target: ALL

Users helping users—and sharing their real-life experiences—is what this session is all about. You'll have the opportunity to talk to Commercial Lines CSRs from comparable-sized agencies about the challenges you face daily and what you can do to make life easier.

**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.*

## AMS Sagitta 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

## AMS Sagitta Session Descriptions

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

**Course #5140      AMS Sagitta**  
**Web Services: What's The Buzz!**

Level: INT    Target: ALL

What are Web services and how do you apply it? Find out at this session. You'll learn what the buzz is all about—from the benefits and capabilities Web services can provide, as well as its limitations.

**Course #5141      AMS Sagitta**  
**Show Me the Money**

Level: INT    Target: ACCT OM

During this class, we'll use real-life scenarios to help you understand how to handle multiple producer compensation options. We'll also give examples using personalization.

PREREQUISITE(S): Agency Accounting Experience

**Course #5142      AMS Sagitta**  
**Create Your Own User Defined Fields and Pages (Hands-on) (R)**

Level: INT    Target: CSR IT SA

See Course #4142 for class description.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

**Course #5143      AMS Sagitta**  
**Download Round Table**

Level: ALL    Target: CSR IT OM SA

Bring your download questions, experiences and solutions to share with other users—at this interactive, round table session. Learn from other agencies and gain the confidence to expand the download process in your agency.

**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

## AMS Sagitta Session Descriptions

### **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*

### **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.

## AMS Sagitta Session Descriptions

**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.**

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

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

**Course #5340      AMS Sagitta**  
**Role-Based Security: Understanding the Options**

Level: INT    Target: ALL

Come learn the in's and out's of role-based security in AMS Sagitta. We'll show you the available screens and options, and explain how to effectively create the role. You'll also learn the various reporting functions available.

PREREQUISITE(S): AMS Sagitta Version 7.x Experience

**Course #5341      AMS Sagitta**  
**Coming Attractions - Part 2**

Level: BASIC Target: ALL

Coming Attractions continued. This is a continuation of Course #4240, AMS Sagitta Coming Attractions - Part 1, but not a prerequisite.

**Course #5342      AMS Sagitta**  
**Come See the Wizard of Certs and EPI (Hands-on) (R)**

Level: BASIC Target: CSR

See Course #4242 for class description.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

**Course #5343      AMS Sagitta**  
**Accounting Round Table**

Level: ALL    Target: ACCT

Have an accounting challenge—or solution? Come learn from and share with your peers. During this round table, you'll have the opportunity to talk about real-life experiences and workflows, gain insight, and meet some great people, too.

## AMS Sagitta Session Descriptions

**Course #5360 Executive Briefing  
Best Practices, Workflows & Information (R)**

Level: ALL Target: ALL  
See Course #5260 for a description.  
*Laura Nettles, Nettles Consulting*

**Course #5361 Executive Briefing  
What's Great in 2009 (R)**

Level: ALL Target: ALL  
See Course #5261 for a description.  
*Steve Anderson, The Anderson Agency Report (TAAR)*

**Course #5370 AMS Product Demo  
The Producer Lifecycle Explained**

Level: ALL Target: ALL  
The lifecycle of a producer involves many steps and touches agencies, carriers, education providers, state regulators and, of course, the customer. Understanding the lifecycle can help you find and retain the best producers. We'll explain how.

**Course #5371 Users' Group Product Demo  
Streamlining Agency Administration**

Level: ALL Target: ALL  
Organizing critical agency and employee data can strengthen data security, improve administrative efficiency and enhance compliance capabilities. Proper data management, when combined with appropriate functionality, can have a significant impact on how an agency can manage its administrative functions. Find out how this AMS Users' Group endorsed product can help.

**Course #5380 Connectivity  
The REAL Power of Change (R)**

Level: ALL Target: ALL  
See Course #5280 for description.

**Course #5390 IT  
Exchange Server (R)**

Level: INT Target: IT  
See Course #5290 for description.

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

**Course #5440 AMS Sagitta  
Assessing Quality Control Procedures**

Level: INT Target: IT OM SA  
Learn how to expand your auditing and quality control to include electronic processes. You'll see the screens in AMS Sagitta that can be quickly audited, learn what to review, and identify the screens that integrate with other applications. We'll also discuss electronic client file audits and the auditing process.

## AMS Sagitta Session Descriptions

### Course #5441      AMS Sagitta

#### **eForms: Where's My Data?**

Level: BASIC Target: ALL

Learn how to increase end-user efficiency by using eForms. We'll show you how to map between data entry and the form, and offer tips and tricks to help you save even more time.

### Course #5442      AMS Sagitta

#### **Importing/Exporting Scheduled Data (Hands-on) (R)**

Level: BASIC Target: CSR IT SA

See Course #4342 for class description.

PREREQUISITE(S): View the Pre-recorded WebEx/Podcast

### Course #5443      AMS Sagitta

#### **Document Management Round Table**

Level: BASIC Target: ALL

Learn and share with your peers at this round table discussion. We'll discuss how to plan for document management, how to implement a plan and the options that are available. Questions? Insight? Bring it all here.

### 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.*

## AMS Sagitta Session Descriptions

**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.