

2010 National Conference Carrier Session List
The following is a list of suggested classes you might want to attend.

| DAY | TIME | Event | Course | Track | Description |
|---------------------|-------------------------|--|--------|--------------------|--|
| Wednesday, March 24 | 1:00 p.m. - 5:00 p.m. | Vertafore Connectivity Forum | | | |
| Thursday, March 25 | 8:00 a.m. - 12:00 p.m. | Vertafore Connectivity Forum | | | |
| | 2:00 p.m. - 3:15 p.m. | Procedures Potluck Round Table(NEW) | 3003 | AMS 360 | Hear real-life experiences from your peers in this course designed to unleash the power of users helping users. Be a part of it all at this interactive round table. Bring your favorite workflow procedure—no matter what it is! We will review as many as time will allow. Plus, all of the procedures reviewed will be made available via download after the conference. |
| | 2:00 p.m. - 3:15 p.m. | Secure E-mail Encryption (NEW) | 3080 | Connectivity | This hugely popular course on secure e-mail encryption at previous ACT and AMSUG webinars is back by popular demand. This course covers the World Wide-standard TLS, but also expands on the previous offering by including other options when TLS isn't available. The course will also look at upcoming enhancements. Learn how to take the TLS secure e-mail solution and make it work in your agency. |
| | 3:30 p.m. - 4:45 p.m. | PL Rating: The Competitive Edge to Help You Sell More Personal Lines (R) | 3170 | Vertafore Demo | Independent agents are consistently winning new customers from direct writers and captive agents by offering choice—quoting more carriers, entering data once, and selling new business in a one call close. See how PL Rating customers are expanding their prospect markets and increasing revenue by leveraging the new Internet rating tools. |
| | 3:30 p.m. - 4:45 p.m. | Get It Done: Real Time | 3180 | Connectivity | Learn how to overcome what might be stopping you from getting the valuable benefits of Real Time in your agency. Join this open forum of agents and carriers discussing implementations of Real Time. The session will focus on working together to overcome roadblocks to implementing inquiry, upload and download. You will leave prepared to get in on the Real Time revolution and have a positive impact for your agency. |
| | 4:45 p.m. - 6:30 p.m. | Exhibit Area Grand Opening | | All | |
| Friday, March 26 | 8:00 a.m. - 9:30 a.m. | Continental Breakfast/Opening Session | | All | |
| | 9:45 a.m. - 11:00 a.m. | Vertafore Solutions: A Look at Best Practices | 4060 | Executive Briefing | Learn from peer agencies who have taken advantage of the Vertafore-integrated suite to expand business, become more efficient, and build profitability. Hear ideas that are working for other agencies that you can take back to your agency to create immediate and long-term gains. |
| | 9:45 a.m. - 11:00 a.m. | Small Commercial Lines Download | 4080 | Connectivity | CLDL is new, improved and better than ever. Find out what's changed. Discover how the process works with Vertafore, other carriers, and agencies. In this class, you'll learn what agencies are doing, what they need, as well as what they see on their screens. Also learn why different aspects are important to different agencies, what carriers can provide, how agencies are managing and the benefits of implementing CLDL. |
| | 11:15 a.m. - 12:30 p.m. | Real Time: Getting Started (NEW) | 4180 | Connectivity | If you haven't looked at it lately, TransactNOW is more than a policy look-up tool. See how the more mature TransactNOW product can benefit your agency—and learn about all its new features. If you tried TransactNOW in the past and abandoned it, this course is for you. |
| | 12:45 p.m. - 1:45 p.m. | Luncheon/Quantum Award Winner announced | | All | |
| | 2:00 p.m. - 3:15 p.m. | Take Charge of Your Download (NEW) | 4201 | AMS 360 | Learn download tips and revisit the IVANS box and download setups. This session gives you the tools and information needed to make download work to the advantage of your agency. |
| | 2:00 p.m. - 3:15 p.m. | Vertafore Town Hall Meeting | 4260 | Executive Briefing | Attend this interactive meeting to hear what Vertafore has been working on and what projects are planned for the future. Give them your input on what they did well this year or what needs improvement. Hear from Vertafore's executive team as they tell you about the company direction for 2010 and beyond. |
| | 2:00 p.m. - 3:15 p.m. | Best Practices for the Executive | 4280 | Connectivity | Come learn to be the best as this course discusses best practices and shows how to identify and implement improved workflows in your agency operations to improve your bottom line. Real Time, data security, commercial lines download and direct bill download will be discussed. |
| | 3:30 p.m. - 4:45 p.m. | Industry Leaders and Best Practices | 4360 | Executive Briefing | Learn what industry leaders and trade associations are doing for you and how you can get involved. This discussion will cover how AMSUG's Industry Relations and Connectivity Committee are interacting with trade associations that support the independent agency system. In a discussion about best practices, see and hear how to implement these workflows in your agency. Learn about industry tools that can help your agency. Learn more about AMSUG's efforts on behalf of independent agencies. |
| | 3:30 p.m. - 4:45 p.m. | Single Sign-on and Identity Management (NEW) | 4380 | Connectivity | IDM and SSO will provide a single credential for all Vertafore products, login-less transition between products, federation for carriers and partners, and a single list of users of Vertafore products. Benefits to Vertafore customers include efficiency gains, better adoption of Real Time, lower administrative burden, lower training costs and better security compliance within their organizations. See how it works and learn the benefits for your firm. |
| | 4:45 p.m. - 6:30 p.m. | Networking Reception | | All | |
| Saturday, March 27 | 7:00 a.m. - 8:00 a.m. | Continental Breakfast | | All | |
| | 8:00 a.m. - 9:15 a.m. | Download Round Table (NEW) | 5003 | AMS 360 | Bring your download questions, experiences and solutions to share with other users at this interactive round table session. Learn how other agencies handle download reports, errors and more. Tell other users about your download workflow, and learn how to make it better. Get answers to your challenges, gain the advantage of peer-to-peer learning, and take additional ideas back to use in your agency. |
| | 8:00 a.m. - 9:15 a.m. | Real Time Connectivity: What's New, Different, and Productive? | 5080 | Connectivity | What is really new and different in the world of connectivity? This course brings you the very latest update. Topics include: CLDL, claims, alerts and activities and notes, tools, commercial lines application upload, PL Rating, and the book roll tool. Learn how Real Time Connectivity brings value to your agency and measurably increases productivity. Find out what's involved in implementing Real Time tools. Learn how to maximize your potential returns. |
| | 9:00 a.m. - 11:00 a.m. | Exhibit Hall Open | | All | |
| | 11:00 a.m. - 12:15 p.m. | Commercial Lines Round Table (NEW) | 5203 | AMS 360 | Every user has had bottlenecks on his/her desk. While you may have found effective workarounds for these areas, check in with this round table to make sure you're on the right track. If you've got one you need to solve, ask for a solution from other users. Share your own solutions for issues you've solved. Join your commercial lines peers to learn and share, ideas and tips that make your job easier. |
| | 11:00 a.m. - 12:15 p.m. | Commercial Lines Realities Round Table | 5243 | Sagitta | Spend time in an informal setting with other CL professionals from across the country. This is the perfect opportunity to share and hear real-life experiences about the everyday challenges faced in commercial lines, as well as get some questions answered! |
| | 11:00 a.m. - 12:15 p.m. | State of the Industry: Agency Value Hanging by a Thread | 5261 | Executive Briefing | Fewer buyers, more sellers, decreasing financial performance, and future economic uncertainty have driven agency valuations on a downward spiral. Leading agencies and brokerages can exploit changing market conditions by understanding the market, reviewing expenses, and embarking on aggressive growth strategies. Gain a perspective on how agency leaders can respond and react to market conditions. |
| | 11:00 a.m. - 12:15 p.m. | Customer Self-Service Using Your Agency's Website (NEW) | 5280 | Connectivity | The point of connectivity is to bring your agency closer to your customer, and vice versa. You'll learn how to add or enhance customer self-service on your agency website. Learn how agencies and carriers can work together to facilitate and improve customer service. This course includes PL Rating customer portal client-facing screen. Following this course you will be able to position your agency to meet the new customer expectation for immediate 24-7 online data and service. |
| | 12:30 p.m. - 1:30 p.m. | Luncheon | | All | |
| | 1:45 p.m. - 3:00 p.m. | Real Time: Beyond Basics (NEW) | 5380 | Connectivity | TransactNOW can take your agency to new levels. In this course, you'll learn how to do just that. If you've ever asked 'What more can I do with TransactNOW?' then this course is for you. Take the existing TransactNOW tool and make it work to the optimum extent for your agency. |
| | 3:15 p.m. - 4:30 p.m. | Industry Connectivity (NEW) | 5440 | Sagitta | Understand what connectivity means to your agency, and how your clients and business partners can benefit from your involvement. Gain knowledge of the many useful resources that can help position your agency for better communication with industry partners. |
| | 3:15 p.m. - 4:30 p.m. | Changing Your Paradigm to Real Time | 5462 | Executive Briefing | Agencies must be ready to meet customer demands for transactions that happen now. With effective Real Time tools that have been developed and continue to improve, the independent insurance agency system is more ready than ever to do so. But how do we manage and change the way agencies do business to make this happen now? Learn how Real Time processing can help you recommit the time saved to your advantage. |
| | 3:15 p.m. - 4:30 p.m. | Using ACORD Forms Even More Effectively | 5480 | Connectivity | The history of insurance ACORD forms has undergone a revolution made possible by technology. Yet, forms still play a key role and make agencies more efficient and productive. This course starts with the basics of forms: where agencies can find current versions of forms, keep up-to-date on the changes/additions, and use the Forms Instructions Guide to determine how to use forms and what data to put in fields. The session will also cover the ACORD process for adding new and modifying existing standard forms for printing and electronic exchange of data. |
| | 6:30 p.m. - 10:30 p.m. | Grand Finale Party | | All | |