



AfW Session Descriptions

Thursday, March 25

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

Course #3010 AfW

Data Integrity (NEW)

Level: ALL Target: IT OM SA

Data integrity is vital. Learn how to check your data input for accuracy and consistency. While this class is especially helpful for those planning to migrate to AMS 360, it is also valuable training for maintaining integrity in your AfW system. Also learn specific how to information on running reports that audit system information.

Course #3050 BenefitPoint

What's New

Level: ALL Target: ALL

Learn the latest on product and strategy updates, technology, and service initiatives—now and down the road—from BenefitPoint. It's sure to be a sell out, so sign up early! Hear about the newest functions, as well as upcoming enhancements of BenefitPoint.

Course #3060 Executive Briefing

Tips for Customer and Prospect Branding

Level: ALL Target: ALL

Agency leaders are reassessing how to present their agency through branding (including prospect marketing and customer care) to drive retention and growth of business. This session will explore what customers and prospects want from an independent agency, and how to deliver on that using efficient marketing techniques. Learn more about how consumers perceive insurance and insurance agencies—and how to use that to the benefit of your agency.

Laurie Donohue, The Van Aartrijk Group LLC

Peter Van Aartrijk, CIC, The Van Aartrijk Group LLC

Course #3061 Executive Briefing

Habitology - The Art and Science of Succeeding by Habit

Level: ALL Target: ALL

Habits are ultimately what drive our lives and as such, the key to mastering our results is to learn where they come from, how to break bad ones and create good ones. If we can't make it a habit, what we are left with as a driver of behavior is will power, which rarely lasts. Come learn how to master your habits and how to use Habitology to lead your team in a new way.

Jeff Gaines, EQ, WiseGuide Training LLC

Course #3062 Executive Briefing

Managing People in a Small Agency

Level: ALL Target: ALL

Agencies with fewer than 20 people can and should be managed very differently than a mega-competitor across town. Agency leaders take on additional roles: head psychologist, chief janitor, troubleshooter, 'buck stops here' person—to name a few. The course will include small-group discussions of common problems managers are facing, and how others are fixing them. In this





AfW Session Descriptions

interactive class, attendees set the agenda by bringing to the course the topics most relevant and important to them. See and hear how your peers are tackling the same issues that you have. Contribute your ideas for how to handle challenges that your peers have.

Sean Neumayer, The Omnia Group

Course #3070 Vertafore Product Demo **Maximize Your Sales Process With ReferenceConnect and Producer Plus**

Level: ALL Target: ALL

Learn how your agency can use the combined power of ReferenceConnect and Producer Plus to get into other markets and increase sales.

Course #3071 AMS Users Group Product Demo **Spam - Now It's Serious**

Level: ALL Target: ALL

Attendees will learn about today's leading security solutions that protect business and employees from dangerous IT threats, including spam, viruses, identity theft, and Internet pollution. Such threats are growing in number and complexity as spammers' tactics are becoming increasingly sophisticated. This session will identify the different types of e-mail ploys, cyber attacks, and the scope of such risks. Attendees will gain a better understanding of the security practices needed for a healthy organization from security expert AppRiver, an AMS Users Group endorsed product.

Course #3080 Connectivity **Secure E-mail Encryption (NEW)**

Level: ALL Target: ALL

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.

Course #3090 IT **What's New With VMWare (NEW)**

Level: TECH Target: IT

Learn about VMSphere, the newest version of VMWare, and what else is on the horizon for this technology. Prepare your agency for the next generation of VMWare and learn how to successfully plan your move forward.

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

Course #3110 AfW **Preparing Your Team for System Changes**

Level: ALL Target: ALL

Learn how to plan and train your team for success through system implementation and upgrades. Learn ways to get buy-in from your team and get motivated for a system change.





AfW Session Descriptions

Course #3150 BenefitPoint Brand New User (NEW)

Level: BASIC Target: CSR

Aimed for the new user of BenefitPoint, this course covers benefit library creation, renewal calendar, and copying plans and rates. Learn how the Copy feature in BenefitPoint Streamlines data entry. See how to manage renewals through the renewal calendar, plus more. See many tips and tricks revealed that will raise your comfort level and productivity! Learn how to perform tasks that are essential to increasing efficiency in your daily workflow.

Course #3151 BenefitPoint Partners and Tools for Your Client Needs

Level: ALL Target: ALL

The management system doesn't stand alone. This course addresses the integration of client-facing systems with client communications portals and online enrollment portals that are in prevalent use. Get ready to integrate BenefitPoint's integration with client communication tools and third-party enrollment vendors.

Course #3160 Executive Briefing Disaster Recovery: Does Your Disaster Plan Include Business Continuity?

Level: ALL Target: ALL

Most disaster plans help you recover from the disaster, but do they keep you in business, answer your calls, and service your customers through the disaster? What if your office is hit? Imagine no phone lines and no electricity to access your computers. What would you do? This is when your customers need you most. Where would your customers go? There is an answer and it is Business Continuity Management. Learn what you need to stay in business throughout the disaster and how to create your business continuity plan—and more.

Richard H. Roy, Jr., Artizan Internet Services

Course #3161 Executive Briefing Why Are My People So Fat, Broke and Busy?

Level: ALL Target: ALL

Over 60% of Americans are either overweight, overspent or overscheduled. You might think, "I've hit the trifecta!" Come learn more about each of these areas, and how you as an employer, can support your team to live healthier lives.

Jeff Gaines, EQ, WiseGuide Training LLC

Course #3162 Executive Briefing Right Size Your Agency in Today's Market

Level: ALL Target: ALL

Hear the most-important questions you should ask yourself when looking at the employee base of your independent agency. These include: What are you aiming to accomplish with your staff? What is right sizing? How do you change the goal from layoffs to creating the smart-sized agency? What areas (besides people) do you need to right size—products and buildings? What about a severance package? How do you choose what/where/how to cut? Take a step back from the process and get a look at the big picture, then wade back in with a fresh perspective.

Sean Neumayer, The Omnia Group





AfW Session Descriptions

Course #3170 Vertafore Product Demo

PL Rating: The Competitive Edge to Help You Sell More Personal Lines ®

Level: ALL Target: ALL

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 from Vertafore.

Course #3171 AMS 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, and improve agency productivity by deploying a pay-as-you-go Exchange hosting model. Understanding the benefits of Microsoft Exchange's rich messaging functionality is crucial for businesses today as it minimizes financial risk, increases productivity, and eliminates the technical burden of running Exchange in-house. This session will identify several benefits associated with hosted Exchange, including: shared calendars, contacts, public folders; remote access capabilities; multiple mobile device access, improved business communications and productivity. Find out what this AMS Users Group endorsed product can do for you.

Course #3180 Connectivity

Get It Done: Real Time

Level: ALL Target: ALL

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.

Course #3190 IT

Free/Open Source Software Options (NEW)

Level: TECH Target: IT

In this session, attendees will learn what is available in free/open source software, and how it can be used in an agency to help save costs and provide security.

Friday, March 26

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

Course #4010 AfW

Migration Assistant Live

Level: ALL Target: IT OM SA

This course is designed to help users understand all the parts of Migration Assistant. Watch an agency find and remove database roadblocks that would be a show-stopper for moving to AMS 360. It will include a review of accounting and system items which need attention, which will include chart of accounts errors, code check, and much more. Don't miss this!





AfW Session Descriptions

Course #4050 BenefitPoint **The Impact of Managing Plans**

Level: ALL Target: ALL

Learn how to properly renew, replace, cancel, or reinstate a plan to create an effective workflow. The focus of the course is to enable the user to manage plans to gain efficiencies on data integrity and reporting. Includes a discussion of the importance of carrier management by the broker administrator, and the impact on the broker user. See how to gain data integrity, track plan history, and monitor plan actions.

Course #4051 BenefitPoint **Commission Tracking in RTM**

Level: ALL Target: ACCT OM

You'll see how to follow the all-important commission trail, how to manage payee records and plan splits, enter and post commission statements, and create reports. In this course, special attention will be spent on uploading electronic statements for a carrier. Learn how to set up RTM, manage payees and splits, and enter statements.

Course #4060 Executive Briefing **Vertafore Solutions: A Look at Best Practices**

Level: ALL Target: ALL

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.

Course #4061 Executive Briefing **Presentation Skills for Everyone**

Level: ALL Target: ALL

Larry Linne speaks globally on the topic of Presentation Skills. He will give insight to the power of effective presentation skills by producers, managers and everyone in the organization. This session will convince you that presentation skills development may be the most important skill for your agency in our current economy. Larry will also give simple strategies to improve your ability to speak one-on-one, or to large groups.

Larry G. Linne, Sitkins Group Inc.

Course #4062 Executive Briefing **The 7 Tips for Building a Business That Runs Without You**

Level: ALL Target: ALL

This course is for agency owners interested in building an asset that creates wealth with—or without—their active participation. This course will teach you seven simple and proven fundamentals. Agency leaders will be able to implement these techniques immediately, to help build a business that continues to grow while you're on vacation!

CJ McClanahan, ReachMore Strategies

Course #4070 Vertafore Product Demo **ImageRight for Agencies**

Level: ALL Target: ALL





AfW Session Descriptions

The survival of brokers and agents has never been more in question. Carriers and customers demand more and more from existing resources, squeezing margins, and threatening survival. ImageRight gives agents and brokers the power to take back control, do more with less, increase commission ratios, enhance customer service, and thrive in a rapidly changing business environment. See how ImageRight's intelligent workflows work seamlessly with your AMS 360 or Sagitta system.

Course #4071 AMS Users Group Product Demo **CSR24: Offer Your Clients Choice in Their Service Needs**

Level: ALL Target: ALL

Artizan's CSR24 is the dominant customer-care solution designed specifically for the needs of the insurance industry. CSR24 combines Internet and telephone accessibility giving clients' choice in communicating. Learn how CSR24 allows agencies to offer extended service hours and choices to: give the agency a competitive advantage, serve as a great retention tool, and incorporate the agency brand. CSR 24 is an AMS Users Group endorsed product.

Course #4080 Connectivity **Small Commercial Lines Download**

Level: ALL Target: ALL

Commercial Lines Download 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 commercial lines download.

Course #4090 IT **Disaster Recovery and Business Continuity - Part 1**

Level: TECH Target: IT

In this two-part session, we will cover the elements of disaster recovery plans and business continuity. This first part will be a presentation of concepts, required components and concerns, etc. In the second part will be a panel of agency reps that have successfully implemented (from an IT perspective) disaster recovery plans. Don't miss this opportunity to learn how others have prepared for and survived disasters and other business continuity challenges.

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

Course #4110 AfW **Best Practices for Certificates**

Level: ALL Target: CSR OM

Learn what works and what doesn't in avoiding errors and omissions in certificates of insurance. Find out who can issue certificates, and what can be issued. What are the E&O pitfalls of "wrong wordings," and what are the considerations with multiple states and multiple locations? Learn how to avoid common mistakes with certificates of insurance, and see the proper use of AfW and the right workflows that significantly reduce the agency's E&O exposure. Plus—hear how to communicate with your staff about the need to take these preventive steps.





AfW Session Descriptions

Course #4111 AfW

Best Practices in the REAL World for CSRs

Level: ALL Target: ALL

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 #4150 BenefitPoint

The Road to Benchmarking (NEW)

Level: ALL Target: ALL

What is benchmarking and how can it benefit your agency? Learn about using firm benchmarking and how to prepare your data for aggregate benchmarking. Once your agency is qualified, you can use the aggregate pool of benefit and contribution data to assist your client or prospect. Discussed are definitions of benchmarking, compliance requisites, and firm and aggregate reporting.

Course #4151 BenefitPoint

Leverage Commission Data Through Reporting (RTM)

Level: ADV Target: ACCT OM

Learn how the current revenue tracking and management (RTM) reports are used for forecasting and reconciliation. Explore current reporting and identify future needs. Through this RTM report review, you'll be able to use revenue data. Hear and share ideas with other users.

Course #4160 Executive Briefing

Information Security Trends

Level: ALL Target: ALL

This session provides an overview of recent trends in information security and data privacy. Topics will include changes in attacks and defensive measures, the evolving legal and regulatory compliance landscape, and strategies for managing related risks. Get up-to-date, and up-to-speed, on information security trends.

Joshua Schmidt, Vertafore

Course #4161 Executive Briefing

Sales Presentations – The Power of Why, How, and What!

Level: ALL Target: ALL

Larry will show agencies the power of using why, how, and what in selling. The presentation will give the audience an understanding why a client should do business with you, what is offered is a commodity, and how an agency works is what differentiates them. The insights from this session will help an agency breakthrough the commodity trap and improve closing ratios.

Larry G. Linne, Sitkins Group Inc.

Course #4162 Executive Briefing

The 5 Success Habits for Bottom Line Growth

Level: ALL Target: ALL

Intellectually speaking, the business of running an independent insurance agency is relatively simple—although it sometimes doesn't seem that way. The roadblock that keeps you from achieving goals is doing what you know needs to be done. This course will teach you the 5 most-important



AfW Session Descriptions

habits you absolutely must develop if you're interested in growing your sales and bottom line. Gain a fresh perspective on the age-old challenge of running an independent agency.

CJ McClanahan, ReachMore Strategies

Course #4170 Vertafore Product Demo **Keeping Agents Licensed and Legal to Sell Using Sircon Tools**

Level: ALL Target: ALL

This session will demonstrate how Sircon solutions can help agencies save time and money getting/keeping their agents licensed. We will also show how an agency can keep track of all its agents' continuing education, license expirations, and appointments with carriers so they can focus on writing new business.

Course #4171 AMS Users Group Product Demo **Procedures: Is Your Agency as Efficient as it Could Be?**

Level: ALL Target: ALL

You've heard the questions—How can we save more time? How can our agency maintain service levels...and increase the time spent selling? This course on procedures let's you step back and take a look at everything your agency does—and find out how to increase efficiency immediately. In this interactive session, be prepared to receive and share ideas. Take advantage of Grace Bauer's 19 year's of experience with more than 1,700 agencies. Grace's service is endorsed by The AMS Users Group.

Course #4180 Connectivity **Real Time: Getting Started (NEW)**

Level: BASIC/INT Target: ALL

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.

Course #4190 IT **Disaster Recovery and Business Continuity - Part 2**

Level: TECH Target: IT

In this second part of this two-part session, we will hear from a panel of agency personnel who have successfully implemented (from an IT perspective) disaster recovery plans. Hear first-hand how others have prepared for and survived disasters and other business continuity challenges. It is recommended attending Course #4090 Disaster Recovery and Business Continuity - Part 1, but not a prerequisite.

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

Course #4210 AfW **Online vs. In-house AMS 360 Panel Discussion**

Level: ALL Target: IT OM SA

You are migrating to AMS 360...should you go Online or stay In-house? Come and listen to agents who have made the decision as they discuss why they chose to go on or in. The discussion will





AfW Session Descriptions

include hosting; bandwidth, connectivity and equipment; as well as how to handle third-party applications.

Course #4250 BenefitPoint

Top 10 Reports: Your Daily Essentials (R) (NEW)

Level: BASIC Target: ALL

Like daily vitamins, daily reports are vital to your agency's health. Learn about the top 10 reports that solve business needs for carrier management and production reporting. Explore reports for new business, retention, lost business, business mix, service distribution, carrier distribution, expected revenue, missing payments, and stewardship. In this course, discussion includes how to define business needs, generate reports and then how to use them for business intelligence. Turn reports to the advantage of agency operations.

Course #4251 BenefitPoint

Engage Your Users to Drive Adoption - Part 1 (NEW)

Level: ADV Target: BA OM

Bringing a new system into the operations and culture of an agency requires a transition. Learn tips and tricks for adopting BenefitPoint into daily workflows. In this course we will learn how to monitor performance and usage through compliance, and create a communication campaign to energize staff with meetings, monthly tips and new release information. Gain knowledge on how your agency can make a smooth transition into using BenefitPoint, and increase interest amongst staff using incentives.

Course #4260 Executive Briefing

Vertafore Town Hall Meeting

Level: ALL Target: ALL

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. Hear and be heard in the Vertafore Town Hall Meeting.

Course #4261 Executive Briefing

Winning in a Competitive Market

Level: ALL Target: ALL

Learn how to handle "shoppers" in a competitive market. Understand the costs associated with customers and prospects who consistently shop. Discover what discount insurers don't want your customers to know, and how to use that to your advantage. Learn new steps your agency can take to win in today's price-competitive market. Probe to learn how to communicate value in discussions with customers and prospects.

Nancy Kinnetz, CIC, Hanover Insurance Group

Course #4262 Executive Briefing

Reduce Taxes and Eliminate Lawsuits

Level: ALL Target: ALL

Get a look at the proper use of legal entities reduce taxes and eliminate lawsuits. Adjust to the increasingly litigious environment in the United States. Better prepare yourself and your agency for





AfW Session Descriptions

the reality of those who would steal through use of the court system. This course teaches the business owner how to use legal entities to protect assets, lower taxes, and eliminate litigation.

Dan J. McNeff, Legally Mine, LLC

Course #4270 Vertafore Product Demo

ICE: Insurance Collaboration Engine (New)

Level: ALL Target: ALL

Learn more about ICE! Vertafore introduces a unique collaboration tool that specifically targets the insurance industry. ICE is an intuitive and secure online tool that makes it easy to connect, share and collaborate with your clients, and other insurance professionals.

Course #4271 AMS Users Group Product Demo

EM²: Raising E-mail to the Easy Power

Level: ALL Target: ALL

In this new demonstration class, you'll see how AMS Users Group endorsed product OneApp Agency integrates data management and e-mail—seamlessly—making it easy to automatically generate reminders about critical deadlines without having to sort data or type e-mail messages. OneApp Agency software was developed specifically for insurance agencies to help manage licenses, carrier appointments, CE, insurance contracts, and much more. Now, you can see the additional capabilities and benefits it can bring to your agency by integrating data and e-mail.

Course #4280 Connectivity

Real Time Best Practices Workflow

Level: ALL Target: OM

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. Tap into greater productivity than you already have by hearing best practices from your peers.

Course #4290 IT

Emerging Security Threats (NEW)

Level: TECH Target: IT

The threats are out there and a concern to any technology professional. Learn by focusing on real-world examples. Discover options for mitigating threats and testing. Learn how to provide a secure network environment and ongoing monitoring and maintenance.

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

Course #4310 AfW

Confessions of a Migrated Agency

Level: ALL Target: ALL

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





AfW Session Descriptions

Course #4350 BenefitPoint **RFP: Create, Invite, Manage and Finalize**

Level: BASIC Target: ALL

Learn how to create and manage online requests for proposals (RFPs). Gain insight into leveraging the responses for creating client presentations. Discussion includes strategies for engaging carriers within the online tool. Plus, you'll see how to finalize the RFP to automatically update the current plan information for the upcoming year. After this course, users will be able to create requests, invite carriers, and manage responses.

Course #4351 BenefitPoint **Engage Your Users to Drive Adoption - Part 2 (New)**

Level: ADV Target: BA OM

Bringing a new system into the operations and culture of an agency requires a transition. Learn tips and tricks for adopting BenefitPoint into daily workflows. Discussions will include monitoring performance and usage through compliance, and creating a communication campaign to energize staff with meetings, monthly tips and new release information. Gain knowledge on how your agency can make a smooth transition into using BenefitPoint and increase interest among staff using incentives.

PREREQUISITE(S): Attend Course #4251

Course #4360 Executive Briefing **Industry Leaders and Best Practices**

Level: ALL Target: ALL

Learn what industry leaders and trade associations are doing for you and how you can get involved. This panel discussion will cover how AMSUG's Industry Relations and Connectivity Committee are interacting with ACT, AUGIE, ACORD and other trade associations that support the independent agency system. Plus: 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, including the Best Practices Guide. Be part of and learn more about AMSUG's efforts on behalf of independent agencies like yours. Hear about opportunities to increase industry involvement. Plus—learn from the best, so you can be the best.

Industry Relations Committee,

Course #4361 Executive Briefing **Outrunning The Economy: Best Practices of High Growth Agents**

Level: ALL Target: ALL

In an environment marked by soft-premium rates and an economic recession, high-growth agencies continue to achieve peak performance. These organizations do not rely on external market conditions to dictate internal performance. Learn about ways that high-performing agencies control their own destiny by creating, building, and executing a sales culture.

Patrick T. Linnert, Marsh, Berry & Co.

Course #4362 Executive Briefing **What's Great in 2010**

Level: ALL Target: ALL





AfW Session Descriptions

Keeping up with new technology in the independent agency channel is a constant challenge. Successful agencies using the right tools the right way will keep them thriving. 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 wikis, blogs, social networking sites like Facebook, and text messaging to engage prospects, clients and employees. You will learn about the latest productivity tools to make your staff and producers more effective.

Steve Anderson, The Anderson Agency Report (TAAR)

Course #4370 Vertafore Product Demo

PL Rating: The Competitive Edge to Help You Sell More Personal Lines (R)

Level: ALL Target: ALL

Independent agents are consistently winning new customers from direct writers and captive agents by offering choices—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 from Vertafore.

Course #4371 AMS Users Group Product Demo

Insuring You Have the Right People

Level: ALL Target: ALL

If you're a decision-maker in an independent agency, you've experienced frustration with CSRs who don't sell, concern about producing more business with fewer employees, and/or uncertainty about whether a new staff person will fit into your team. Insuring You Have the Right People hits all of these common issues (and more) head-on in a group discussion class. (Bonus: Sign up before February 14, 2010 to receive a personality assessment, an AMS Users Group endorsed product, that will be covered in class.)

Course #4380 Connectivity

Single Sign-on and Identity Management (NEW)

Level: ALL Target: ALL

IDM & 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.

Course #4390 IT

Project Management Success (NEW)

Level: TECH Target: IT

Learn a proven methodology of project management using tools of risk management and six sigma that can be applied to projects based on both technology and business processes. Gain access to proven project management procedures to help ensure success for projects and to meet deadlines.





AfW Session Descriptions

Saturday, March 27

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

Course #5010 AfW

What You Need to Know About Required Setups in AMS 360

Level: ALL Target: OM SA

Learn how to handle the new required setups in AMS 360 for new functionality we don't have in AfW. This course will cover these details, including important billing considerations. Be prepared for what you need to have in place when you go live.

Course #5050 BenefitPoint

Manage Clients Through Activity Logs

Level: BASIC Target: CSR

Client activities give you a picture of what clients need and want in the course of the business relationship. This course will help you learn to track and report on client requests, steps taken, resolutions, and time spent managing accounts. Learn steps for communicating with team members regarding ongoing and long-term issues. This course will include capturing pertinent claims information, restricting insured access details, and integrating with the agency e-mail system. Plus, you'll see how to generate information useful for creating stewardship reports. Keep on track with client activities through the activity logs tools.

Course #5051 BenefitPoint

Customize to Meet Your Firm's Needs

Level: ADV Target: BA OM

Even a well-designed system can't anticipate precisely what your agency needs. That's where customization comes in, and this course gives you the background to make it work. You'll learn how to utilize customizations and implement personalized data standards to meet your business needs; create new fields, disable fields and mark fields required; customize dropdown menus; identify personal health information; customize templates; as well as generate event driven workflow. Turn customization to your advantage and make it work for your agency's specific needs.

Course #5060 Executive Briefing

Taking Back Control of the Internet, Social Networking, Facebook, and Twitter

Level: ALL Target: ALL

This session will explain to agency owners, managers and system administrators the ways that their employees' Internet use can pose risks to the agency, both from a security standpoint and the productivity impact. We will also demonstrate an AMSUG-endorsed employee Internet management solution that gives managers control of the Internet at the individual and organizational levels. Learn the hidden problem presented by Internet access in the work environment, and how to proactively solve it.

Course #5061 Executive Briefing

Advanced Sales: Planning to Win

Level: ALL Target: ALL





AfW Session Descriptions

This session focuses on sales goals Setting, Measurement and Achievement—the Sale as a Process, Managing a Prospect Inventory, and Keeping the Focus on Sales at all times. Each participant will be asked to set or review sales goals and to define the actions needed to achieve those goals. They will also design a sales process system to follow, and discuss prospect inventory options. Making sales a singular focus in all job functions will be the closing message.

Course #5062 Executive Briefing Surviving Healthcare Reform

Level: ALL Target: ALL

Healthcare Reform—how will an agency that sells health insurance not only survive, but thrive in the uncertain future? Discuss the latest issues surrounding healthcare reform, how it will impact your agency, and more importantly, what you can do to thrive into the future.

Course #5070 Vertafore Product Demo BenefitPoint: Designed To Grow Your Benefits Business

Level: ALL Target: ALL

Find out how we can help you reduce operational costs, and achieve your growth and customer service goals by automating your processes for account and plan management, reporting, and revenue tracking. Plus, learn how it integrates out-of-the-box integrations with agency management systems, HR portals, benefit administration and online enrollment applications.

Course #5071 AMS Users Group Product Demo NetQuote's Lead Management System

Level: ALL Target: ALL

NetQuote's Lead Management System, an AMS Users Group endorsed product, is a new tool designed to help agents process leads more efficiently to improve close rates and increase sales. It gives agents the tools they need to automatically send e-mails when leads are received, set-up e-mail reminders, review return on investments for policies sold—and more!

Course #5080 Connectivity Real Time Connectivity: What's New, Different, and Productive?

Level: ALL Target: ALL

What is really new and different in the world of connectivity? This course brings you the very latest update. Topics include: commercial lines download, 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.

Course #5090 IT Infrastructure (NEW)

Level: TECH Target: IT

Learn about the optimal infrastructure components of a successful agency management system environment. This session will prepare your agency for deployment and/or upgrades of the Vertafore suite of applications.





AfW Session Descriptions

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

Course #5210 AfW

Understanding Security Differences in AMS 360 and AfW

Level: ALL Target: OM SA

There are more levels of security in AMS 360. That means you have more control. It also means you have more choices to make! Learn what the differences are in this informative class. Learn the enhancements of security for your database, and how AMS 360 gives you more control.

Course #5250 BenefitPoint

Top 10 Reports: Your Daily Essentials (R) (New)

Level: BASIC Target: ALL

Like daily vitamins, daily reports are vital to your agency's health. Learn about the top 10 reports that solve business needs for carrier management and production reporting. Explore reports for new business, retention, lost business, business mix, service distribution, carrier distribution, expected revenue, missing payments, and stewardship. In this course, you'll discuss how to define business needs, then generate reports and use them for business intelligence. Turn reports to the advantage of agency operations.

Course #5251 BenefitPoint

Report Administration: Move Your Firm Forward (New)

Level: ADV Target: BA OM

Learn about the advanced features of reporting that help you gather information for your business needs. Explore custom reporting through subscriptions, administration, mail merge, and accelerators. Plus—a discussion on premier reporting will show you the value of this advanced tool.

Course #5260 Executive Briefing

Risk Management - Case Study

Level: ALL Target: ALL

During this session, hear the Gaylord Risk Manager discuss issues they face managing risk for a large hotel/entertainment facility. Come hear about challenges when dealing with risk, insurance, and the economy.

Willaim Teas, Gaylord Entertainment Comptany

Course #5261 Executive Briefing

State of the Industry: Agency Value Hanging by a Thread

Level: ALL Target: ALL

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.

Wayne A. Walkotten, CPA, CVA, Marsh, Berry & Co.





AfW Session Descriptions

Course #5262 Executive Briefing

Employee Engagement: How to Motivate, Mentor, and Mobilize Employees

Level: ALL Target: ALL

Are your agency employees truly engaged? The connection between employees' commitment to something or someone in their organization has emerged as a critical driver of business success. Managers will learn key factors on how to assess, influence, and build employee allegiance. Take home a fresh perspective on the employees you hire and try to motivate.

Emily Huling, CIC, CMC, Selling Strategies Inc.

Course #5270 Vertafore Product Demo

What's New With CBDDoc

Level: ALL Target: ALL

The best just keeps getting better! CBDDoc Version 3.4 includes a wealth of enhancements, and new features that deliver the most advanced document management solutions available today. Learn how document management can make your agency more efficient. Remember, if you haven't seen CBDDoc lately, then you haven't seen CBDDoc.

Course #5271 AMS Users Group Product Demo

Lessons Learned from Real-World Recoveries

Level: ALL Target: ALL

Agility Recovery provides disaster-recovery services to hundreds of Vertafore users and their clients. Join us to hear first-hand how Agility helped Vertafore users successfully recover following a business interruption. Learn more about the true value that AMS Users Group endorsed product ReadySuite provided their agency, clients and community.

Course #5280 Connectivity

Customer Self-Service Using Your Agency's Website (NEW)

Level: ALL Target: ALL

The point of connectivity is to bring your agency closer to your customer, and vice versa. In this course, 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 (available March 2010). 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.

Course #5290 IT

Think Like a Computer (NEW)

Level: TECH Target: IT

Computer terms and concepts abound, and no one person can keep up with everything—unless you “think like a computer.” Bring queries about confusing or new terms to this session. The session begins with a few key baseline concepts that everyone must understand for efficient and accurate use of your U2 UniVerse Data Server. From there, see the white boards get filled with “plain English” answers to your queries. Learn how to use the successful “Think Like a Computer” technique and be equipped to discover answers for yourself.





AfW Session Descriptions

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

Course #5310 AfW

Top Ten E&O Pitfalls to Avoid in AfW (NEW)

Level: ALL Target: CSR OM

This comprehensive course is designed to help your agency be more efficient and avoid problem areas. Included in this course are hidden considerations for E&O in AfW, how to know what to look for, and what can get you into trouble that you don't know about. Gain the insights and experiences to help avoid errors and omissions issues with AfW.

Course #5350 BenefitPoint

Feedback Forum: Share Enhancement Ideas

Level: ALL Target: ALL

Come to our "blue sky" session and meet with the developers. In this session, you'll be able to put your suggestions and ideas for enhancements—front and center—to developers. Plus, you'll see what other users want enhanced and explore whether those ideas can benefit you and your agency. Share your enhancement ideas on how to make BenefitPoint work better for you. This open forum provides you with the opportunity to discuss your ideas and feedback with the experts who work on BenefitPoint.

Course #5351 BenefitPoint

Connect Through Web Services

Level: ADV Target: BA IT OM

Web services provide significant capabilities to BenefitPoint users as a low-cost alternative to integrating internal and client-facing systems. Push forward with Web services with this course, where you'll learn what web services is and how to integrate Web services with other in-house systems. You'll hear significant discussion of how to retrieve, insert, and update real-time BenefitPoint details to import into other systems.

Course #5360 Executive Briefing

Older 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 #5361 Executive Briefing

E&O Claim Case Study

Level: ALL Target: ALL

This course will look at your Vertafore product and show the proper use of tools and the right workflows to significantly reduce your agency's errors and omissions exposure. We'll also discuss how to communicate this need to your staff. Learn from a real-world case study.

Curtis Pearsal, Utica National Insurance Group

Course #5362 Executive Briefing

How to Become the Agent of Choice

Level: ALL Target: ALL





AfW Session Descriptions

Most insurance buyers think all insurance agents are alike. That is far from the truth given the expansion of online and direct response agents and companies. And unless agency employees understand the unique competitive advantages of their agency, they can't sell against the clever advertising and fast-selling ability of the competition. Participants will learn what independent agents offer that set them apart; what agents are really selling; and strategies, techniques and tools to build agent-customer relationships. Gain new tools for positioning your agency in the marketplace and empowering your employees and producers.

Emily Huling, CIC, CMC, Selling Strategies Inc.

Course #5370 Vertafore Product Demo Producer Plus Key Features With Q&A

Level: ALL Target: ALL

This session will cover a few key features of Producer Plus such as Submission Workflow, Proposals, and AMS 360 Activity Integration. Time will also be allotted for a Q&A session with attendees to cover features that most interest the audience.

Course #5371 AMS Users Group Product Demo iPrevision: AMSUG-Endorsed Employee Internet Management Solutions

Level: ALL Target: ALL

Whether agency leaders know it or not, employees siphon time away by using work computers to access social networking sites, instant messaging, shopping, video and music, gaming, gambling, pornography, and other non-business sites. iPrevision's AMS Users Group endorsed product monitors Internet, instant messaging and e-mail usage. Learn how iPrevision allows agencies to monitor Web usage, block file types, block sites/categories of sites, and restrict personal use of web resources. This course gives an up-close look at a product that helps agencies be more productive and reduce legal, security and business risks by managing employee use of the Internet.

Course #5380 Connectivity Real Time: Beyond Basics (NEW)

Level: INT/ADV Target: ALL

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.

Course #5390 IT Scripting Options for IT Administration (NEW)

Level: TECH Target: IT

Learn how to streamline and automate daily routine tasks by creating scripts that will reduce your time to complete them. This session shows you how to divert time spent on routine, redundant tasks and apply it to higher value-added priorities.

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

Course #5410 AfW Selecting the Right Training Option for Your Migration (NEW)

Level: ALL Target: OM SA





AfW Session Descriptions

Training for a migration can make all the difference. Learn what to look at when making the decision. Covered in this course are details of each Ready Set Go training option, how to determine if your agency should have e-learning or onsite training, and how to select a live date and prepare for the training program. Make sure your agency is better prepared for training events. Improve your learning retention. Gain a better understanding of the eight-week training program. Gain the ability to plan for a successful live date.

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

Level: ALL Target: ALL

This session is meant to get answers to your questions. Plus, it's your chance to let your best tips and tricks see the light of day to help other users. Learn tips and tricks for implementing and utilizing the application by sharing ideas with other users. Have your questions answered about getting started, defining data standards, managing accounts, entering plans, and creating requests.

Course #5460 Executive Briefing **What is Social Media and Why Should I Care?**

Level: ALL Target: ALL

Have you heard about blogs, RSS, Twitter, Facebook, and Linked In and wondered what in the world these tools are? Attend this session to learn about each of these products, and why you want to consider signing up for an account for your agency.

April Feldt, AMS Users Group

Course #5461 Executive Briefing **Create a Winning Team**

Level: ALL Target: ALL

Learn the Path Elements Profile (PEP™). This new personality and communications tool helps teams operate at peak performance with higher productivity, lower turnover, high morale and low stress by tapping into the unique strengths of each team member, making better hiring decisions, and learning top communication among employees. Jumpstart your agency team's performance with the Path Elements Profile.

Lane Henderson, Lane Henderson Communications

Course #5462 Executive Briefing **Changing Your Paradigm to Real Time**

Level: ALL Target: ALL

Independent 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? How do we change staff processes? How do we manage the new procedures? Learn how Real Time processing can help you recommit the time saved to your advantage.

Jerry D. Fox, James M King & Associates





AfW Session Descriptions

Course #5470 Vertafore Product Demo ClientConnect for P&C and Employee Benefits

Level: ALL Target: ALL

Attract new business and improve client retention with this communication solution. ClientConnect makes it easy to differentiate your business and raise the value of your services. With a custom-branded online portal from ClientConnect, you can focus on being a trusted advisor and empower your clients with knowledge.

Course #5471 AMS Users Group Product Demo Tired of Hearing "I Can't Pull That Report?"

Level: ALL Target: ALL

Irritated with being told you can't get information on your customers? Frustrated when you know you have the information to market your customers but can't get it out of your system? Join us and learn how you can pull that information from your AMS 360 or AfW system. Need a true and current book of business? How about a comparison between new and retention business? Wondering where your commission dollars are going? Are your clients liability limits up to par? Discover how forward thinking agencies answer these questions by tapping into the information in your AMS 360 database and creating accurate and professional reports with ease using QueryPlus, an AMS Users Group endorsed product.

Course #5480 Connectivity Using ACORD Forms Even More Effectively

Level: ALL Target: ALL

The long 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.

Course #5490 IT Managing Your Network Traffic and Bandwidth (NEW)

Level: TECH Target: IT

Panel members will focus on tools designed to troubleshoot performance issues with their network and/or applications. Come listen how others keep their networks and systems performing efficiently and securely.

