# SmartOffice

## Success Plan for Penn Mutual Reps

Now that you have SmartOffice, do you have a plan in place to maximize its potential in your office?

Effective use of SmartOffice can help you to increase production, improve office efficiency, step-up client communication, manage leads more effectively, and improve collaboration amongst your team. Whatever the need, SmartOffice can deliver!

For over 30 years we have been helping customers achieve success through the effective use of our application suite. Through this experience, we have learned that while every firm has its own unique business model, the highest performing firms have recognized that effective implementation requires an investment of time—and following the best practices shared below.

The **Success Plan Action Items** that follow are the 6 most important things you should incorporate right away to ensure you lay a solid foundation upon which to grow your business with SmartOffice.

Finally, we have provided and easy to follow **Getting Started Checklist** to plot your SmartOffice course and help track your progress.

Read on to see how you can get started on the road to success today!

## Success Plan Action Items

1 **Set Goals:** Goals are the building blocks of the success plan and are what will be used to guide all implementation and training efforts. SmartOffice is a means to an end and not the end itself, so the single most important thing you can do right now is identify 3 to 5 (or more if you're ambitious!) production, service, and/or back office goals. Whenever possible, goals should be quantifiable so you can measure your success.

We like to say that technology follows business and not the other way around. Keep the focus on your business and the functionality will follow.

2 **Appoint a SmartOffice Go-To Person:** This should be a staff member who has a good grasp of technology and has a vested interest in the success of SmartOffice. This person will help configure SmartOffice, create users and assign the appropriate rights, assist in coordinating training efforts, and act as the control point for support issues.

3 **Assess Your Data:** Data entered into SmartOffice whether from a conversion, import, sync, or manual process can wind up being inconsistent, incomplete, or redundant. Your data does not need to be perfect, but clean data leads to better adoption, more accurate reporting, and more efficient record identification and analysis.

The old adage "Garbage in—Garbage out" comes to mind. Taking steps to ensure that information is added accurately and consistently to the database will pay off in the long run.

If your database is yet to be populated with data and there is a source database that will be used for this purpose, conduct data cleanup efforts in the source data prior to bringing it into SmartOffice.

**4 Ensure Your Equipment is Ready:** Keep workstations up-to-date with the appropriate software and service packs to ensure successful operation of all programs, including SmartOffice. Items that should be installed and/or run on each workstation include:

- Anti-Virus software
- Anti-Spyware
- Pop-up blockers (Run Analyzer for proper configuration and configure browser)
- Optimization programs
- Internet cache clearing run on a regular basis (e.g., weekly)

**5 Commit to Ongoing Training:** Rome was not built in a day. Those who have been most successful with SmartOffice have adopted a phased approach to their learning. Allocate time for training on a regular basis whether it be individualized or in a group setting. This can be achieved by:

- Ensuring existing and new staff members attend free training provided by either Penn Mutual or Ebix.
- Making SmartOffice an agenda item in staff meetings.
- Sponsoring SmartOffice "lunch and learns" where staff members conduct SmartOffice training in their area of expertise.
- Setting aside an hour at the beginning or end of the day every two weeks to allow staff members to view the latest Fast Class and practice the concepts presented (if appropriate).
- Scheduling web-based or on-site training facilitated by one of PML's SmartOffice experts.

**6 Provide Leadership:** Change can be difficult for some people and software adoption efforts are often derailed by staff members who are averse to changing the way they currently operate. It is essential that you lead by example and make SmartOffice a priority for you and your business.

You play a pivotal role in the successful adoption of SmartOffice , so make it a point to clearly articulate the expectations you have for the software and for each staff member and/or department. By doing this and offering a collaborative environment in which ideas can be shared and solutions discussed you will dramatically increase your chances of success.

## Helpful Resources

### Mobile Access Links

- Mobile Access Login (SmartOffice Anywhere) [click here]
- SmartOffice Fast Class for SmartOffice Anywhere [click here]
- SmartOffice Anywhere Help [click here]

### Free Online Training

We offer a series of free, instructor-led, web-based classes designed to deliver core, building block SmartOffice knowledge, best practices and strategies to turn your data into dollars. Attend these classes as soon as possible [click here]! Topics include:

- SmartOffice Orientation
- Contact Management Course
- Calendar Management Course
- Reporting and Filtering Course
- SmartPolicies Course

## Getting Started Help

The topics below address many common questions users have as they begin to use SmartOffice. Click on each item to learn more.

- Getting Started
- Running SmartAnalyzer
- Signing Out of SmartOffice
- General Navigation
- Creating Letters (correspondence)
- Posting E-mail Messages to Outlook
- Sending Messages to Other Users in the Office
- Setting User Preferences

## Practice Management Support

The Practice Management Team is responsible for training and how-to support. The Practice Management Team will also help with the implementation of service models and work flows.

For Penn Mutual training, please check the Producers Place calendar. For a personal consultation, please contact by email: PracticeManagementSupport@pennmutual.com

## Technical Support

Technical support is available through Penn Mutual's Solution Center. The team can be reached at:

- Toll-Free: **1-800-523-4860**
- E-Mail: SolutionCenter@PennMutual.com