

SmartOffice

Agency Management for Brokerage General Agencies

The Goal

The success of your agency depends on your organization's ability to drive continued growth by managing new business, servicing your existing clients, managing operations, and identifying new markets. To achieve these goals, you need business systems designed to address your specialized needs.

The Solution

The SmartOffice CRM and Agency Management System is designed to streamline and manage the complexities of your brokerage business. The solution delivers integrated management reporting, powerful case management, and complete marketing and sales tools. By linking your back office case managers with your front office sales team, SmartOffice can help reduce case processing time, identify new sales opportunities, and ensure the highest level of customer service.

The Result

A culmination of feedback and best practices from hundreds of agencies spanning over 15 years provides you with an off-the-shelf comprehensive solution that meets the specialized needs of a BGA/IMO and performs like you've spent months of time and budget on customization.

Core System Features

- CRM includes client tracking and relationship management, activity tracking and history, calendar/time management, correspondence and document tracking, notes, and powerful reporting.
- **SmartOffice Anywhere** provides you with REAL browser/device independence and access to your CRM data anywhere, anytime—no plugins or extra modules necessary.
- **MS Office Integration** allows you to access SmartOffice without ever leaving Office applications including Outlook, Word and Excel.

Insurance Solutions

- **SmartResource Database** links SmartOffice into a seamless database of carrier and product information and underwriting guidelines that is continually updated with the latest information.
- **Case Management** helps you take control of multi-carrier, multi-product new business processing by leveraging Ebix's DataXchange solution to automatically download carrier status updates directly into the Policy Tracking Data fields. Case managers can accept carrier updates automatically or use side-by-side processing to manually validate new data.
- **Policy Tracking** covers all types of policies (Life, DI, Medical, LTC, Annuity, Group, Auto, Homeowner, and Umbrella) and lets users view policy information globally or by individual, group, or household, as well as track the purchase or sale of subaccount shares for variable life policies.
- **Group Benefit Tracking** helps track group benefits data, giving you the information you need to advise your business clients on which products to add to their employee compensation package, as well as track key employees to cross-sell individual products.

The image shows a composite view. On the left, a screenshot of the SmartOffice software interface displays a customized dashboard with various widgets. One widget shows a pie chart titled 'All Active Term Cases By Advisor' with segments for different advisors. Another widget shows news from CNNMoney.com and Fortune magazine. Below these are sections for 'Summary Of Cases In Underwriting By Carrier' and 'Policy # Primary Insured Carrier Name Product Name Benefit Annualized Premium'. On the right, a photograph of a modern office environment is shown. Several people are working at desks with large windows in the background, suggesting a bright and collaborative workspace.

SmartOffice Customized Dashboards

Insurance Solutions Continued—

- **Production Dashboard** provides a consolidated view of production numbers for individual advisors, branch offices, or organizations in a clear, easy to understand format. The production numbers are rolled up nightly from the information entered into the SmartCaseManager module. In addition to providing these numbers on the Advisor screen, they are also available through Dynamic Reports so users can easily compare and report on production.
- **Commission Tracking (Full Version)** helps track and manage commissions to ensure payment from every carrier and payment to every agent. Commission specialists can build contracts and track commissions at user-defined hierarchy levels to identify, report, and resolve unpaid commissions, and build commission projections to assist with forecasting of revenue.

A screenshot of the SmartOffice software interface showing the 'Commission Hierarchy' feature. The main window displays a grid titled 'Contract Hierarchy' with columns for 'Advisor Contract', 'Contract No.', 'First Name, Last', 'Type', and 'Paid By'. The data shows a hierarchy where an 'Advisor' (Philip Anderson) is associated with a 'House' (Best Brokerage Agency, BGA), which is further broken down into 'Supervisor' (Daniel Odell) and 'Advisor' (Philip Anderson). To the left, there are navigation menus for 'Calendar', 'People & Companies', 'Sales & Marketing', 'Reports', 'Insurance', 'Investments', 'Commission Utilities', 'Utilities', 'Setup', and 'Integrations'. A sidebar on the left lists 'Carrier Name' options like 'ABC Life', 'BNW Financial', 'BWN Financial', etc.

Commission Hierarchies

- **Service Provider Integrations** save valuable time by ordering paramedical services, APSs, etc. associated with underwriting requirements automatically—receiving statuses back from the vendor for each requirement directly from your SmartOffice desktop. Participating service providers include:

- APPS
- EMSI
- ExamOne
- Express Imaging Services
- Jetstream APS
- RSA Medical
- Superior Mobile Medics

- **Popular Industry Integrations include:**

- | | |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> - Constant Contact - Copy Talk - LaserApp | <ul style="list-style-type: none"> - Mobile Assistant - PaperClip - SureLC by SuranceBay |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|

- **Carrier Pending Case Downloads** allow case managers to reduce and even eliminate redundant data entry by receiving automated pending case status downloads directly from the carrier home office. Participating carriers include:

- | | |
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| <ul style="list-style-type: none"> - Accordia Life - Allstate - American General Life Co. - American National Insurance Co. - Athene - The AXA Group - Genworth Financial Group - Legal and General America, Inc. - Lincoln Financial Group - Manulife Financial / John Hancock - Metropolitan Life Insurance Co. - Nationwide | <ul style="list-style-type: none"> - North American Co. for Life and Health - Pacific Life - Principal Life Insurance Co. - Protective Life Insurance Co. - Prudential - The Savings Bank Life Insurance Co. of Massachusetts (SBLI) - Securian / Minnesota Life - Transamerica - United of Omaha / Mutual of Omaha - Voya Financial / ReliaStar - Zurich |
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The image features a double exposure effect. On the left, a silhouette of two men in suits walking away from the viewer is superimposed over a background of a modern city skyline at dusk or night. Overlaid on the right side of the image is a screenshot of the SmartOffice software interface, specifically the 'Advisor' detail screen. The software has a clean, modern design with a white background and blue header. It displays various tabs like 'Advisor', 'Pending Cases', 'Policies', etc., and a detailed view of an advisor's information, including personal details, contact numbers, and production statistics.

Advisor Detail Screen

Sales & Marketing Solutions

- Presale/Proposal Tracking** with integration to Winflex and VitalSales Suite allows agencies to automate the quoting/illustration process by providing access to multiple carriers and products through the power of WinFlex Web and VitalSales Suite. Users are able to launch WinFlex Web and the VitalSales Suite from within SmartOffice, leverage agent and contact data; and save detailed quote/illustration data and images back into SmartOffice's presale proposals area.
- Opportunity Tracking** helps track and manage sales pipelines and internal agency processes. Custom define stages within your process and setup actions to be executed at each stage (schedule activities, print follow up letters, etc.) A detailed Opportunities Dashboard gives management instant visibility into each opportunity to determine the best course of action. Views include opportunity-specific activities and communication, where each opportunity falls within the sales pipeline, and how actuals compare to the sales forecast.
- Lead Tracking** helps your organization effectively manage and distribute new leads. Measure the effectiveness of marketing campaigns by tracking the follow-up and successful close of new business.
- Event Tracking** helps you and your staff manage every aspect of event planning—from initial marketing outreach, to follow-on communication, attendee registration, on-site planning, and lead tracking and follow-up.

Advisor Connectivity

- SmartView for Advisors** lets you provide live pending case status and underwriting updates online. Advisors and agents access their information via user ID and password, eliminating the need for time-consuming telephone calls, and helping them to serve their clients faster and more effectively.
- Insurance Sync** allows Agencies managing new business in SmartOffice to distribute data to sub-agencies and agents that also use SmartOffice. As pending cases are updated in your agency's SmartOffice system, Insurance Sync will automatically process those updates in the Agent's SmartOffice system.

Policy #	Contact Name	Product Name	Basic Face	Annualized Premium
77953373	Arrieta, Michael J.	Total Coverage	150,000	2,400.00
60796798	Sollett, James	American Level 10	100,000	1,624.00
6554236	Hwang, Noah L.	American Level 20	500,000	1,439.88
4521584	Hwang, Noah L.	Assurable Variable Life	1,000,000	2,200.00
2304500	Halverson, Randall C.	FuturePlan	150,000	2,000.00
5323490	Ackerman, Joseph M.	Preferred Life	100,000	1,800.00
456642	Adams, Margaret	American Level 10	150,000	1,800.00
87562341	Alexander, Sherman	Economizer	360,000	2,000.00
1226325	Buy, Jennifer	Bene-PPO	3,000,000	
321394312	Scranton, Robert L.	Universal Coverage	500,000	1,348.00
02643213	Anderson, Mike	Universal Coverage	500,000	1,900.00
0792234	Wolton, Peter	Universal Coverage	500,000	2,976.00
9774694	Baker, Robert	Market Rate Annuity		250,000.00
98569	Bartels, Frank J.	Annuity Plus		50,000.00
798464	Adams, Iris P.	IncomeProtectorPlus		2,400.00
798465	Adams, Iris P.	Lifestyle Protector		2,400.00

Pending Case Management

The SmartOffice BGA Implementation

While today's Brokerage General Agencies all share certain basic processes and business challenges, every organization is different. More complex than a standard SmartOffice implementation, BGA solutions often include complex data downloads, integration with applications from other vendors, and data conversions. The SmartOffice BGA Implementation ensures these technologies are applied correctly to support your business.

This specialized implementation helps BGAs focus on the right solution components to achieve immediate benefits, add new functionality in a logical, step-by-step process to help your organization achieve your business goals, and work with you on an ongoing basis to optimize your solution for continuous value.

Step 1: Let Ebix hold your hand

Ebix's BGA implementation team will be there to assist every step of the way. A project manager and elite training team with industry experience will be assigned to your agency.

Step 2: Convert your existing data

Our team can convert your data from Agency Integrator, Oracle GA, GBS, Advisors Assistant, and most other database systems.

Step 3: Learn the SmartOffice basics and more

by taking advantage of these valuable training options as soon as your license is activated:

- Customized Instructor-Led Online Training a customized training curriculum will be rolled out to support your agency's specific implementation—all from the comfort of the user's own desk.
- On-Demand Online Training Library provides anytime, anywhere access to pre-recorded courses covering introductory to advanced concepts from any computer. Provides a quick and easy onboarding option for new hires or periodic refresher courses.

Step 4: Setup and Configuration

We'll configure the following to make sure SmartOffice will perform at its best and that you achieve maximum potential.

- Workstation Readiness
- Reports / Dashboards
- Carrier Downloads
- Partner Integrations

Step 5: Ongoing Support

Virtually unlimited access to our experienced and knowledgeable support team. Get the answers you need when you need them via telephone, e-mail, or fax.

Contact us at 800.777.9188 or bgasales@ebix.com
and take the next step for your practice.



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