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

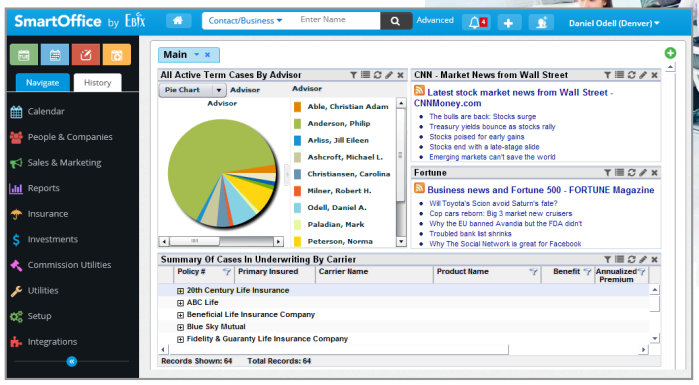
A culmination of feedback and best practices from hundreds of agencies spanning over 15 years provides you with an off-the-shelf comprehensive solution that meets the specialized needs of a BGA/IMO and performs like you've spent months of time and budget on customization.

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

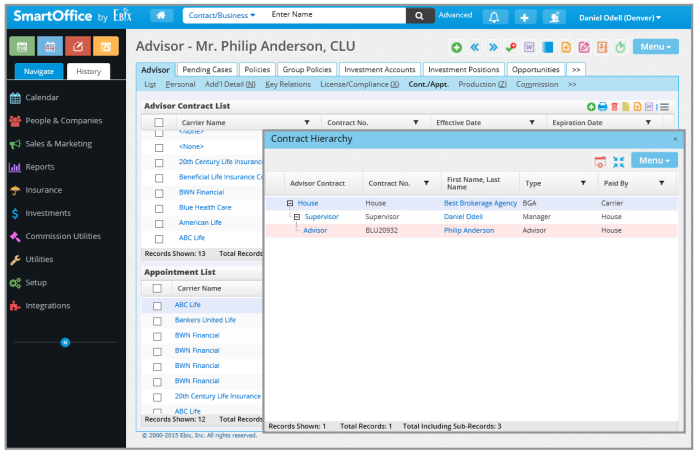
- **SmartResource Database** links SmartOffice into a seamless database of carrier and product information and underwriting guidelines that is continually updated with the latest information.
- **Case Management** helps you take control of multi-carrier, multi-product new business processing by leveraging 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.



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.



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:

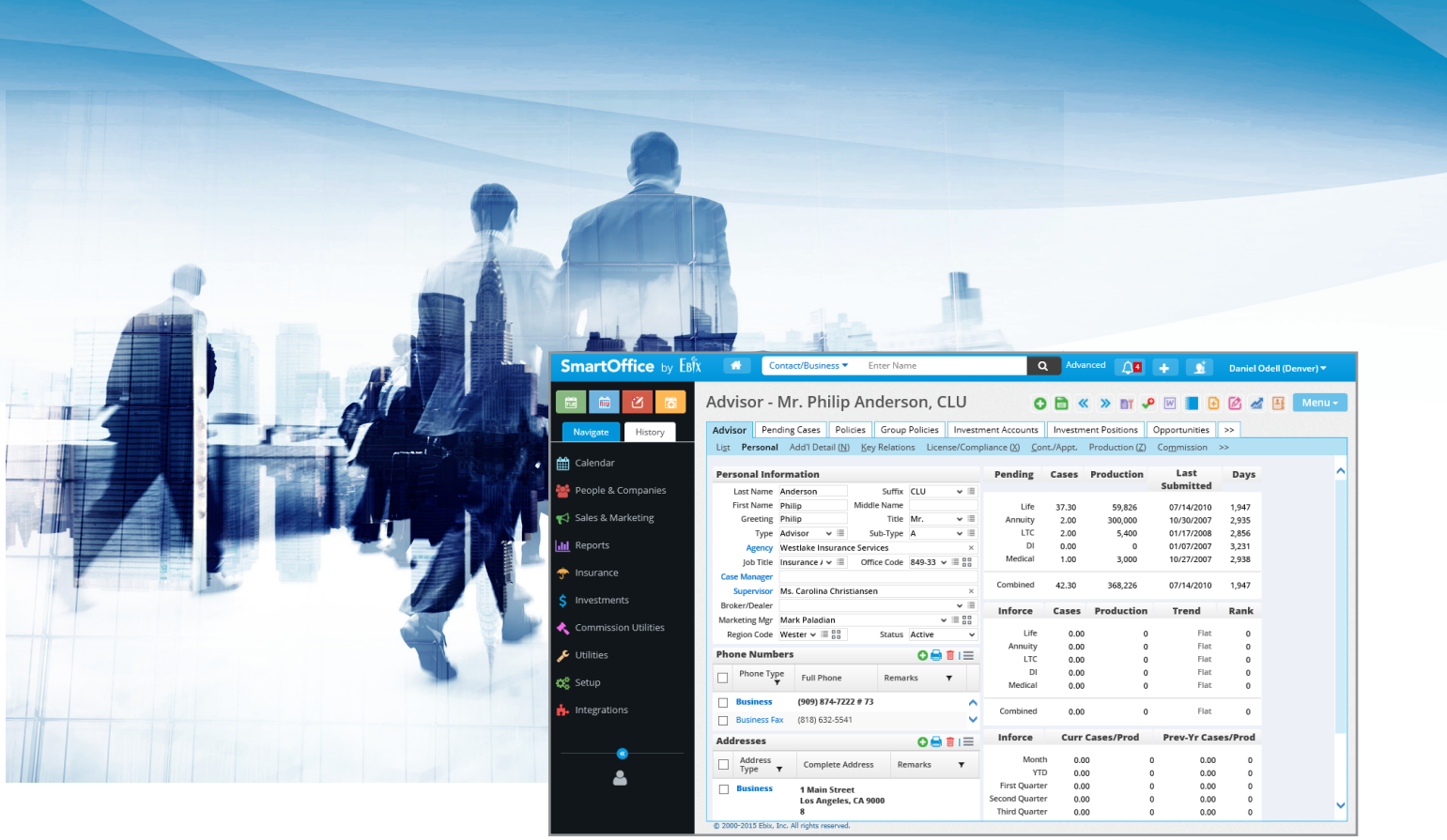
  - APPS
  - EMSI
  - ExamOne
  - Express Imaging Services
  - Jetstream APS
  - RSA Medical
  - Superior Mobile Medics

- **Popular Industry Integrations include:**

  - Constant Contact
  - Copy Talk
  - LaserApp
  - 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:

  - Accordia Life
  - Allstate
  - American General Life Co.
  - American National Insurance Co.
  - Athene
  - The AXA Group
  - Genworth Financial Group
  - Legal and General America, Inc. / Banner / William Penn
  - Lincoln Financial Group
  - Manulife Financial / John Hancock
  - Metropolitan Life Insurance Co.
  - Nationwide
  - 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



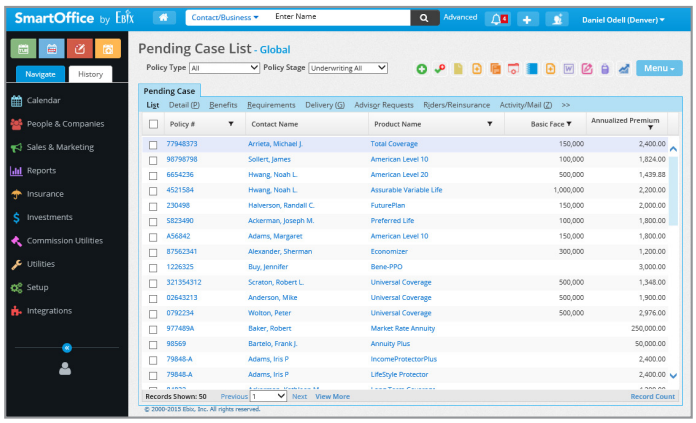
Advisor Detail Screen

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.



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 indus try 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 with 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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