# SmartOffice
# MICROSOFT® OFFICE PLUG-IN
## Add advanced client management capabilities to Microsoft Office

Do you rely on Microsoft® Office as your primary tool for managing and communicating with your client base? If so, you're not alone. Many financial advisors, insurance agents and other financial services professionals use familiar, time-tested productivity applications like Outlook®, Word® and Excel® to run their businesses.

Nevertheless, you may have heard the buzz about modern customer relationship management (CRM) solutions and their potential benefits, including more integrated note, document and activity tracking; advanced reporting and analysis; and easier identification of sales opportunities. As enticing as that might sound, change isn't easy; like many busy professionals, you might not have the time or resources to set up and learn a new system.

Unfortunately, standing still in today's tech-driven business environment is dangerous. Your competitors are exploring the latest tools to help them attract prospects and build profitable, long-term client relationships. Is there a way you can stay competitive in the current market while continuing to use the software you already know?

There is a way: the Microsoft Office Plug-In from Ebix.

## Leverage the Power of SmartOffice

The Microsoft Office Plug-In boosts the power and features of your office applications by incorporating some of the best features of SmartOffice, Ebix's premier CRM solution for financial services professionals.

With this solution, you can continue to use Outlook, Excel and Word as your main productivity tools, with the added ability to draw on valuable customer data stored in your cloud-based SmartOffice database. The plug-in essentially transforms Office from a static means of storing and working with client data into a dynamic, cloud-connected portal that delivers a comprehensive picture of your clients' finances. This solution provides you with greater insights into your clients' needs, as well as better tools for servicing, marketing to and communicating with them—all within the familiar Office environment you're already comfortable with.
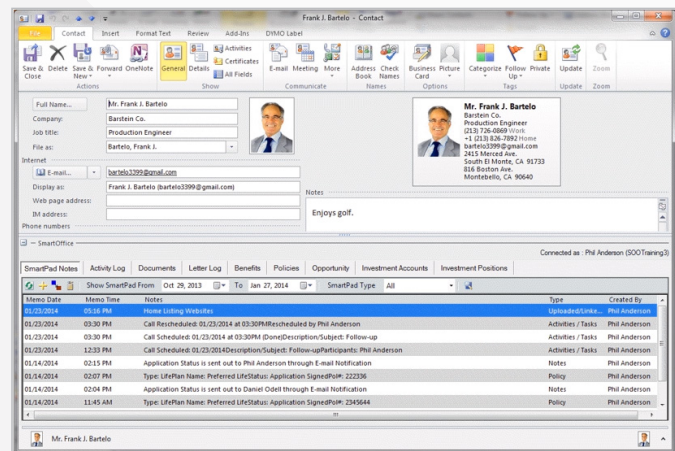


With Ebix's plug-in, you can see a wealth of useful data about a client at the bottom of the Outlook contact record. The notes, activities, documents, letters and holdings are pulled from SmartOffice, but you view and manage them in Outlook.

Ebix

## Step into the Future

With the Microsoft Office Plug-in, Ebix helps you stand on familiar ground while providing you with the latest, most innovative client management technology. Its quick setup and low learning curve lets you sidestep the disruption to your day-to-day operations that can result from adopting an entirely new system. That means less time spent learning tools—and more time spent on growing your business.

| Microsoft Office Plug-In for SmartOffice | |
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| **Office Application** | **Plug-In Capabilities** |
| **Outlook** | • Open an Outlook contact to view SmartOffice notes, past correspondence, upcoming activities, important documents, policy and investment holdings, sales opportunities and insurance illustrations.<br>• Open an Outlook appointment or task to see related SmartOffice activity notes and activity history.<br>• Synchronize Outlook contacts to your SmartOffice database.<br>• Post Outlook e-mail messages to a client's SmartOffice record.<br>• Access and/or push SmartOffice data into other applications using the plug-in's support for third-party integrations. |
| **Excel** | • Search for and run a variety of SmartOffice Dynamic Reports™ directly from within Excel.<br>• Edit and further analyze report results in an Excel worksheet to gain new insights into your client base. |
| **Word** | • Create letters easily by drawing from a vast library of form letters created especially for financial services professionals.<br>• Save time by using SmartOffice merge codes to automatically insert client contact information and other relevant data from SmartOffice into your letters. |