

SmartOffice®

Premier Edition for Brokerage General Agencies

PRODUCT OVERVIEW



Improve communication and
streamline business processes
to drive new growth

SmartOffice®

Premier Edition for Brokerage General Agencies

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.



"SmartOffice extends our team to the point that it's literally like adding another person — or more — to our team, without the added expense."

William T. Wright, CFP
President & Founder
Financial Professionals Group



Bringing it all together

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 client service.

Streamline your business to drive results

SmartOffice Premier Edition for BGAs is designed to streamline and manage the complexities of your brokerage business. The solution delivers integrated management reporting, powerful

Grow your business with valuable business benefits



SmartOffice Premier Edition gives you the tools you need to excel in the areas most critical to your business growth:

■ Pending Case Management

Increase the productivity of your staff with carrier downloads and automated new business processing

■ Broker Management

Track license and appointments, contracts, production, and manage complex producer/agency hierarchies

■ Servicing

Build and maintain stronger relationships by delivering targeted and timely agent communications

■ Reporting

Use comprehensive and flexible online reporting tools to review, analyze, and manage all aspects of your business

■ Marketing

Systematize marketing to exploit new markets, develop new producer relationships, and close new sales

■ Business Value:

Optimize the value of your firm by creating an organized, manageable, and collaborative framework for your business



“SmartOffice supports multiple usage models, enabling us to use the solution for our own needs in dealing with the carriers, while giving our member agencies proven marketing and contact management tools to help them build better relationships with their customers.”

Christopher Soniat
Executive Director
BRAMCO

SmartOffice®

Software designed for the way you do business



SmartOffice Premier Edition

Brokerage General Agency Package*

- **Comprehensive Case Management**
Track and manage new business from informal application to inforce policy
- **Automated Workflows**
Drive new business processing efficiencies using configurable workflows
- **Pending Case Downloads**
Automatically update pending cases with carrier data feeds directly into SmartOffice
- **Agent/Agency Management**
Track license, contract, and appointment information, and manage producer and agency hierarchies
- **Advisor Request Tracking**
Easily manage individual advisor compliance
- **Calendar and Activity Management**
Manage organization-wide activities from a common calendar
- **Marketing Management**
Drive business growth with more effective marketing campaigns
- **Production Reporting**
Display trending, ranking, and production statistics for individual producers or within a hierarchy
- **Management Reporting**
Identify bottlenecks in case management workflows and run detailed metrics on new business
- **Service Provider Integration**
Directly place orders and receive status from participating underwriting information service providers
- **Microsoft Office Integrations**
Leverage the strengths of Outlook, Word, and Excel from within SmartOffice and automatically link MS Office documents with SmartOffice case and advisor files

Optional Modules*

- **Commissions Tracking**
Validate payments from carriers and to agents, manage override compensation arrangements
- **Sales Opportunity Tracking**
Ensure every sales lead reaches its full potential
- **SmartLink for Insurance Brokers**
Automatically share case underwriting activity details and status updates from your agency with SmartOffice brokers
- **SmartView for Advisors**
Provide your brokers and advisors with live pending case status and underwriting updates online
- **Software Integrations**
Share data with popular industry applications, including Intellysis, PaperClip, and Winflex Web

*Please see the Features and Optional Modules Overview for additional information.

The BGA Partners for Success Program

Achieve the highest potential value in the shortest possible timeframe.

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 BGA Partners for Success Program is available to ensure these technologies are applied correctly to support your business.

This valuable consulting package 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.

Ask your Ebix CRM representative for details.



Getting started is as easy as 1-2-3

Step 1:

Convert your existing data

from CDS, Commerce Agency, and most other database systems

Step 2:

Learn the SmartOffice basics... and more

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

■ **SmartStart Training**

provides pre-packaged, role-specific curriculum to help your team quickly and easily learn the most valuable features of SmartOffice — all at no additional cost.

■ **On-Demand Online Training Library**

provides anytime, anywhere access to pre-recorded courses covering introductory to advanced concepts from any computer.

■ **Instructor-Led Online Training**

provides personalized training sessions to support office-wide implementations or periodic refresher courses — all from the comfort of the user's own desk.

Step 3:

Let Ebix CRM hold your hand

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

SmartOffice Premier Edition — Brokerage and General Agencies Package

Features Overview

Comprehensive Case Management

Track and manage new business from informal application to enforce policy. Leverage Ebix CRM's DataXchange solution to automatically download carrier status updates directly into SmartOffice data fields and streamline multi-carrier, multi-product new business processing.

Automated Workflows

Optimize business processes by customizing workflows and creating case processing procedures that fit the way you do business. Automated online follow-ups provide activity and status reminders to keep you from losing track of critical tasks and timelines, and customizable security settings allow non-case-manager users to have read-only access to case information.

Pending Case Downloads

Case managers can reduce and even eliminate redundant entry by receiving automated pending case status downloads directly from the carrier Home Office. By generating automatic status updates to your agents via email, fax, or letter, managers can significantly cut the time required to support agents on the phone.

Agent/Agency Management

Manage member agencies using a complete view of licenses, contracts, and appointment information, as well as hierarchies. Complete document tracking provides an electronic document trail by capturing and logging electronic and scanned documents, and attaching them to the contact's record in SmartOffice.

Advisor Request Tracking

Track and follow-up on service requests by gaining full visibility into inbound and outbound service incidents. All activity can be tracked right in the advisor's contact record, and online service reports provide real-time visibility into issues, giving your team the power to resolve problems quickly and maintain strong, valued relationships with your advisors.

Calendar and Activity Management

SmartOffice gives you the power to manage all of your activities in one easy-to-use repository. The integrated online calendar provides day, week, and monthly views, group and resource scheduling, and appointment and event planning.

- Schedule and track the history of all client activities and quickly view unfinished or overdue projects.
- Easily log appointments, phone calls, projects, and associated action items, and receive optional prompts for scheduling follow-up activities.
- View a daily, weekly, or monthly itinerary to easily schedule events such as team meetings and other critical business activities.

Marketing Management

Leverage the valuable information in your SmartOffice database to drive more effective marketing campaigns. From list generation to mass e-mail and direct marketing to campaign management, you can create more value and drive more business.

- Cross-reference various kinds of information using dynamic filters and customized sets to target marketing campaigns to the best possible demographic.
- Define unique contact sets to generate specialized campaigns, then distribute via printed mail-merge letters or broadcast e-mail/fax based upon the recipient's preferred communication method.
- When used with Sales Opportunity Tracking, you can easily track and measure the impact of each marketing campaign by tracking the number of leads generated, who they were assigned to, and their current stage in the sales cycle.

Production Reporting

Manage member agencies using a complete view of production numbers for individual advisors, branch offices, or organizations provided in a clear, easy to understand format. Production numbers are rolled up nightly for use in comparison, production, and dynamic reports.

Management Reporting

Easily create standard and custom management reports to provide visibility into operations. From the amount of sales activity taking place, to new investment dollars being acquired, to the flow of pending cases through the firm, advisors can gain an understanding of where to focus their attention

Service Provider Integration

Eliminate the time-consuming process of ordering services manually and chasing after statuses by ordering paramedical services, APSs, etc. associated with underwriting requirements and automatically receiving statuses back from the vendor for each requirement directly from your SmartOffice desktop. This streamlined approach to requirement ordering is directly integrated into the SmartOffice pending case workflow, and the electronic ordering functionality is available to SmartOffice users at no additional charge.

Microsoft Office Integrations

SmartOffice is integrated with Microsoft Office products, including Outlook, Word, and Excel. SmartOffice automatically posts outgoing and incoming Outlook e-mails to each contact's SmartPad, providing a complete communication history — including all attachments — without the hassle of double entry. To simplify the reporting process, reports run in SmartOffice can be moved directly into Excel.



Optional Modules

Commissions Tracking

SmartOffice gives commission specialists the ability to build contracts and track commissions online at user-defined hierarchy levels. By streamlining the process of identifying, reporting, and resolving unpaid commissions, as well as building commission projections to assist with forecasting of commission revenue, you can significantly reduce the resources needed to handle this critical task.

Sales Opportunity Tracking

Track and manage every sales opportunity. 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 actual results compare to the sales forecast.

SmartLink for Insurance Brokers

Using this link, SmartOffice BGAs can propagate status updates directly to a broker's SmartOffice database automatically and in near real time. This significantly reduces the need for phone updates and virtually eliminates manual re-entry of data by the broker. Both parties work from the same comprehensive, up-to-date pending case information — including home office status as reported by the carriers' new business and underwriting teams, as well as current case activity being managed by the BGA's case managers.

SmartView for Advisors

Using SmartOffice, you can provide live pending case status and underwriting updates online. Advisors and agents access their information 24X7 securely via the Web, eliminating the need for time-consuming telephone calls, and helping them to serve their clients faster and more effectively.

Partner Integrations

SmartLink for Intellysis automatically links scanned documents to the Intellysis (ExamOne) website so that they can be viewed from within SmartOffice.

SmartLink for PaperClip provides a seamless interface between the PaperClip electronic document management solution and SmartOffice to streamline workflows for both case managers and agency personnel who subscribe to both solutions.

SmartLink for Winflex Web provides the ability to launch Winflex Web from the SmartOffice Proposal Tracking module, automatically passing contact data to Winflex and saving the illustration pages back to the contact record in SmartOffice.

For a complete list of available integrations, go to www.ezdata.com/partners.

"We are determined to make the relationship between ourselves, our agents, and our carriers totally efficient and seamless. We discovered firsthand that putting SmartOffice in the hands of highly qualified case managers moved us forward in achieving this goal."

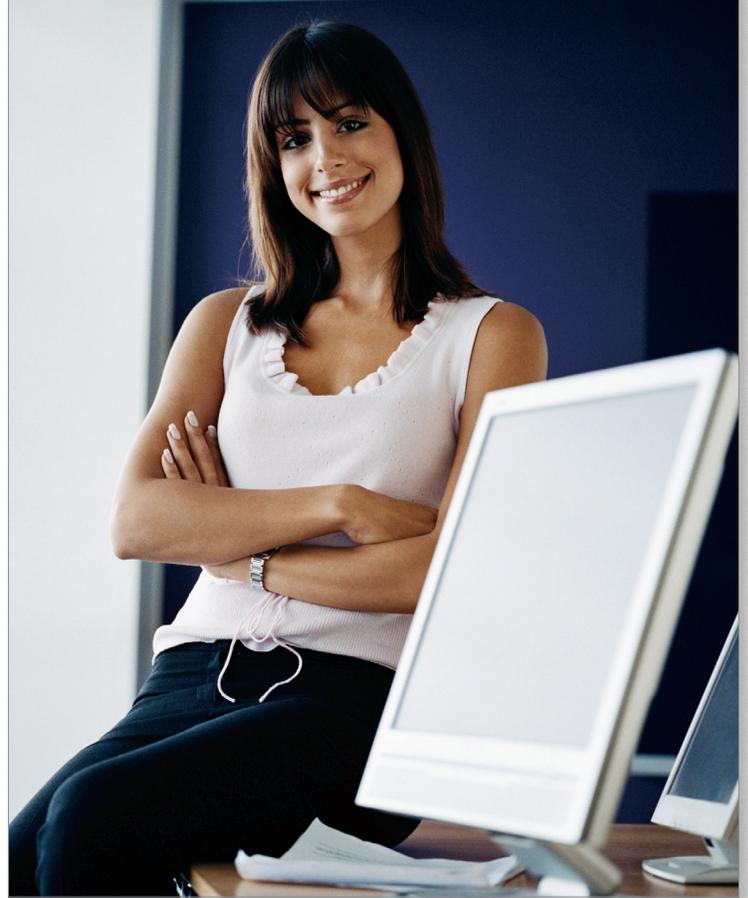
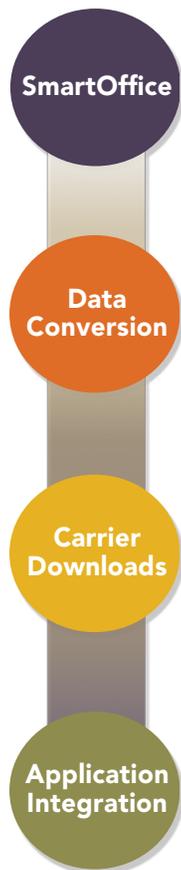
Allan D. Gersten
CLU, ChFC, CFP
Chairman & CEO

First American Insurance
Underwriters of Needham

SmartOffice®

To learn how **SmartOffice Premier Edition for BGAs** can help you grow your business, call 800-777-9188 or go to www.ezdata.com.

BGA SOLUTION



ABOUT EBIX

A leading international supplier of On-Demand software and E-commerce services to the insurance industry, Ebix, Inc., (NASDAQ: EBIX) provides end-to-end solutions ranging from infrastructure exchanges, carrier systems, agency systems and BPO services to custom software development for all entities involved in the insurance industry.

With 23 offices across Singapore, Australia, the US, New Zealand, India and Canada, Ebix powers multiple exchanges across the world in the field of life, annuity, health and property & casualty insurance while conducting in excess of \$100 billion in insurance premiums on its platforms. Through its various SaaS-based software platforms, Ebix employs hundreds of insurance and technology professionals to provide products, support and consultancy to thousands of customers on six continents. Ebix's focus on quality has enabled it to be awarded Level 5 status of the Carnegie Mellon Software Engineering Institute's Capability Maturity Model (CMM). Ebix has also earned ISO 9001:2000 certification for both its development and BPO units in India. For more information, visit the Company's website at www.ebix.com.