SmartOffice Success Plan

Advisor & Agent Practices

Now that you have purchased SmartOffice, do you have a plan to maximize its potential for your business? Maybe you want to increase productivity, improve efficiency, step up client communication, handle leads better, or improve collaboration.

Having worked with customers like you for more than 30 years, we've learned how users achieve success with our applications. This guide outlines the top six things you can do to make SmartOffice work for you, as well as the training options available.

EBIX

The Big 6

1 Set Goals

Goals are the building blocks of the success plan. The most important thing you can do is to identify at least three to five production, service, and/or back-office goals. Whenever possible, choose quantifiable goals so you can measure your success.

2 Appoint a Go-To Person

Choose 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, help coordinate training efforts, and act as the control point for support issues.

3 Assess Your Data

Data entered into SmartOffice from a conversion, import, sync, or manual process can be 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 adage "Garbage in, garbage out" applies. Ensuring 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 you have a source database that will be used for this purpose—be prepared to share a sample of the most important data you want to bring into SmartOffice.

4 Ensure Your Equipment is Ready

Keep workstations up to date with the latest software updates. Items that should be installed and/or run on each workstation include:

- Security software (anti-malware)
- Microsoft Windows and Office updates

5 Commit to Ongoing Training

Successful SmartOffice customers adopt a phased approach to their learning. Allocate time for individualized and/or group training on a regular basis by:

- Ensuring existing and new staff attend our free training classes (discussed later).
- Making SmartOffice an agenda item in staff meetings.
- Sponsoring SmartOffice "lunch and learns" to facilitate knowledge sharing. For example, staff members can present a 30 to 45-minute SmartOffice training session on a specific topic.
- Setting aside an hour a day every two weeks to allow staff members to view the latest Fast Class video and practice the concepts presented (if appropriate).
- Scheduling web-based or on-site training with one of Ebix's SmartOffice experts.

6 Provide Leadership

Change can be difficult for some, 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. 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.**

How Can Ebix Help?

Help Articles & Videos

The SmartOffice Training and Help System lets you browse or search hundreds of free help articles and videos, including our short Fast Class videos covering everything from basic contact management to advanced reporting. To access the SmartOffice Training and Help System, click here.

Free Online Training Classes

Learning SmartOffice's core functionality is a building block for all future initiatives and is essential to long-term success.

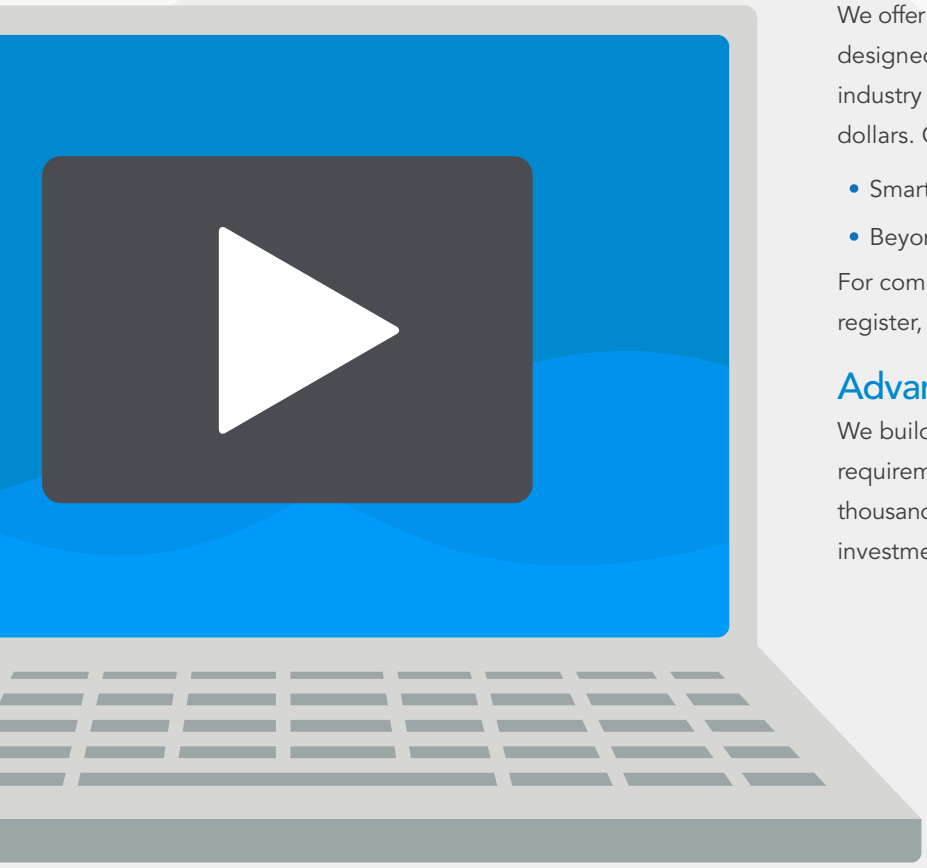
We offer a series of free, instructor-led, web-based classes designed to deliver not only this knowledge, but also industry best practices and strategies to turn your data into dollars. Classes offered include:

- SmartOffice Overview - Recommended for new users!
- Beyond the Basics

For complete information about course content and to register, visit our Training Calendar.

Advanced Training & Consulting Options

We build training programs to meet your goals and unique requirements. Our team of seasoned trainers has helped thousands of customers get the most out of their SmartOffice investment. **Read on to learn about our training packages!**



Basic Training Package | $500

Getting Started

Objective: Master basic navigation skills, gain an understanding of how the various components of SmartOffice work together, discover the value of your data, learn the efficiencies that can be achieved by using the calendar, and communicate internally and/or with Ebix to determine next steps.

What's Included:

✓ **Introductory call to gain insight into your unique business structure and goals.**

✓ **Two 90-minute sessions focusing on these keys areas of SmartOffice below:**

- Contact/Data Management
- Customizing Data Views
  - Maintaining data consistency for a healthier database
  - Segmenting contacts for marketing and sales efforts
  - Tracking referral business
  - Creating households and establishing key relationships
  - Using custom fields and screens to track important information
- Calendar/Activity Management
  - Setting individual preferences for viewing tasks and activities, entering activity data, and completing activities
  - Creating activities and tasks
  - Attaching documentation to calendar entries
  - Posting calendar entries to maintain compliance
  - Using the activity outcome feature to document next steps
  - Syncing options for calendar activity (Microsoft Exchange users only)
- Dynamic Reporting
  - Displaying useful report information right on your homepage dashboard
  - Automatically e-mailing reports inside and outside your organization
  - Automating reporting
  - Creating tasks and correspondence from report output

To make the most of your training investment, attendance in the free training classes available is highly encouraged. To learn more, please visit our training calendar here or email our training team at CRMTrainingcalendar@ebix.com.

SmartOffice
Powered by Ebix

Advanaced Training Package | $600

To the Next Level

Objective: Obtain tangible results through streamlined workflows, new and/or improved customer outreach initiatives, and/or enhanced management tools delivered via customized dashboards.

Note: Classes will be hands on and will be conducted using data in your "live" office. Mastery of the concepts covered in the *Basic Training Package* is essential prior to enrolling in this session.

What's Included:

- ✓ **Detailed discovery session to gain a familiarity with your unique business requirements and objectives for use in framing the session agendas.**
- ✓ **Two 90-minute sessions focusing on items to be determined through consultation with Ebix.**

Recommended content could include:

- Contact/Data Management
  - Birthday/age reports will be created and placed on the home page dashboard
  - Sharing of reports within the office to all individuals or select individuals
- Calendar Management
  - Calendar reports will be created and placed on the home page dashboard
  - Current year's appointments/calls sorted by contact (clients with goal attached)
- Overview
  - Opportunity Management
  - Policy Management
  - Pending Case Management
  - Event Management

Build Your Package | $250 / hour

Training & Consulting

Let us build a custom training program based on your unique business requirements. This training option provides superior flexibility in session content and scheduling and works well for offices large and small.

To learn more, please contact Training Manager Philomena DiCicco at (626) 585-3505 ext. 7367 or phil.dicicco@ebix.com.

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