

Thursday, April 26
2:00 p.m. – 3:15 p.m.

Course #3101
AMS360

What's New

Level: ALL Target: ALL

NetVU Conference is THE place to learn the latest and greatest Vertafore has to offer. This session focuses the newest functionality of AMS360 and upcoming enhancements. Learn directly from Vertafore product management about the latest product updates, strategy, technology developments, and service initiatives.

Course #3111

BenefitPoint

What's New

Level: ALL Target: ALL

Exclusive to the NetVU Conference learn the latest on BenefitPoint. This is the place to be for the most up-to-date news on product enhancements, strategy, technology, and service initiatives. You will also learn how health care reform affects how you do your job.

Course #3131

Sagitta

What's New

Level: ALL Target: ALL

Find out what's in store for Sagitta users. Get the current buzz, learn the status of new releases, and see the newest functionality. Are you on the latest version? Is the future just an install away?

3:30 p.m. – 5:00 p.m.

General Session

Disney's Approach to Business Excellence

The power you need to propel your organization forward is waiting at Disney Institute through Disney's Approach to Business Excellence. You will learn the five most powerful lessons in business; lessons carefully developed by the Disney organization in its never-ending pursuit of excellence. These universal assets of a successful business - inspiring creativity, leadership excellence, people management, quality service, and brand loyalty - are the links in the renowned "Chain of Excellence." Together, these lessons forge an enduring bond between inspired leaders, motivated employees, and satisfied customers that drives financial results and sustains years of repeat business.

Disney Institute

Friday, April 27
9:45 a.m. – 11:00 a.m.

Course #4101
AMS360

Principals Guides to Accounting

Level: INT Target: ACCT, AP

This session is designed for agency principals. It covers important elements of accounting in AMS360, including balance sheet analysis, ratios, evaluating bookkeeper's work, and guarding against embezzlement. We will also review how setup decisions affect agency financial statements.

Course #4102

AMS360

Standard Reports

Level: INT Target: ACCT, AP, CSR

Find out what the top 5 most common reports are in your workflow, and what they should tell you. Learn how and why you should run, and use these typical reports.

Course #4103

AMS360

What's Available NOW in AMS360

Level: ALL Target: ALL

What have you been missing? This is the place to get the highlights from the last four releases. Learn about key features like message attachments, carbon copy suspense, distribution of eForms, enhanced download, renewal tools, and ACORD updates. Plus you'll learn from the best practices guides and workflows available to you.

Course #4104

AMS360

Round Table - HotShot Table - Round 1

Level: ALL Target: ALL

Real-life experiences; users helping users. Be a part of it all at this interactive round table. Learn from each other, and find new ways to make your life easier. Bring your questions, comments, and your own best practices to this round table session.

Course #4111

BenefitPoint

We Are Family: Execs, Accounting, Users and Me

Level: ALL Target: ALL

Having everyone on the same page is invaluable. Procedure deviation directly impacts your bottom line. Understand how each department works and interacts with one another. Learn how to establish procedures,

and build relationships to create a more efficient office and ensure accuracy.

Course #4112

BenefitPoint

RTM-Managing Agency's Rev Through Reporting - Part 1

Level: ALL Target: ALL

If you like finding cash between the sofa cushions, then you'll love this session. Learn how the current revenue tracking and management (RTM) reports can be used to find missing money, and track where applied money is going. By using RTM to ensure data is properly entered in BenefitPoint, you can stay on top of payments to producers, identify top carriers by premium and revenue, and use various reports for forecasting and reconciliation. This is Part 1 of a 2-part series, and is a prerequisite for attending Course #4212.

Course #4121

Principal Connection

Industry Change Requires a New Producer Profile

Level: ALL Target: AP

Our industry is changing fast, and the producers of the past will struggle to be successful. This session will give insight to why it is changing, what attributes the future producer will have if they are going to be successful, and also address how multiple generations will play into this dilemma.

Larry G. Linne Sitkins Group Inc.

Course #4122

Principal Connection

What CEOs Need to Know About IT Mgt.

Level: ALL Target: AP

Agencies have become increasingly automated over the last couple of decades. You and your clients have to be able to access information in "real time." With the adoption of agency management systems, everyone in your agency has become more tech savvy, including you. However, the IT team is still the one keeping those systems running. Do you know how to monitor your systems? Do you know what questions to ask your IT team to ensure the seamless flow of information within your agency, the industry, and with your customers? This session will discuss questions to ask your IT department about upgrades, system downtime, E&O exposure, contingency plans, disaster recovery, and other security measures.

Steve Anderson The Anderson Agency Report (TAAR)

Course #4131

Sagitta

Is Your Money Safe? - Part 1

Level: ALL Target: ACCT

Spend your morning with us as we present a best practices view of accounting. During the first part of this discussion we will cover E&O, Premium Trust, Sarbanes Oxley, and GAAP accounting. In addition, fraud controls in accounting are essential, so we will be covering segregation of duties using role-based security and code maintenance. This session counts as an Elective Class toward the NetVU Accounting Certification. You must attend both Parts 1 and 2 for the credit.

Course #4132

Sagitta

Day in the Life of a CSR - Part 1

Level: ALL Target: CSR

The CSR's knowledge and understanding of data flow through the entire system is a critical element in ensuring the data is entered correctly, completely, and consistently. The first two parts of this series of sessions will cover, among other topics, where your policy data is stored, the use of agency-defined fields/pages, client level units at risk, and how/why to use these features. You'll see a demo of the import/export feature, and learn how it can save you time. Also, you'll get a review of how to create standard defaults, and what coverages and screens can be set. This is Part 1 of 4 a 4-part series, but is not a prerequisite for Parts 2-4.

Course #4133

Sagitta

Coming Attractions (Repeat)

Level: ALL Target: ALL

Learn from the experts about the latest updates planned for Sagitta, and what the future enhancements will bring. What is Sagitta NextGen, and what are the system requirements? With this knowledge, you can plan for your future upgrades. Know now what the software will bring down the road.

Course #4141

TECH

Implementing a Data Loss Prevention Strategy

Level: TECH Target: IT, SA

As our workplace becomes more mobile, the risk of data loss has become greater. How do you identify where your data resides, and the many ways data can leave your organization? Implementing a transparent security policy, data protection technologies, and backup/recovery solutions are some of the topics that will be discussed.

Course #4151

WorkSmart

WorkSmart Tips and Tricks - For Current Users

Level: ALL Target: ALL

Attend this interactive session and find ideas from users, for users. The panel of experienced WorkSmart users will share their favorite tips. You'll be able to ask questions, or share your own ideas.

11:15 a.m. – 12:30 p.m.

Course #4201
AMS360

ProActive Bookkeeper

Level: INT Target: ACCT, AP

As a bookkeeper you are the barometer of the agency's success. In this session, you will learn how to make the best accounting decisions for your firm's needs. You will find answers to questions that every bookkeeper needs to address, such as: What database method should you use? How do you handle financial discrepancies? What verification reports should you give to your Executive? Should you write off small balances, or adjust the invoice? If so, who makes the adjustment? All of these and more will be answered here.

Course #4202
AMS360

Creative Reports

Level: ADV Target: ACCT, AP, CSR

Knowing how to create effective reports can save time and money, but knowing how to use reports in creative and unusual ways is priceless. Learn how to customize your reports to suit your specific needs. Understand and manage parameters, work with pivot tables and formulas, and create functional target lists.

Course #4203
AMS360

Do You Know This Is E&O

Level: ALL Target: ALL

Learn best practices in protecting your agency against E&O claims. Understand how to set up your procedures in alignment with legal guidelines in order to stay in business and protect your assets.

Course #4204
AMS360

Round Table - HotShot Table - Round 2

Level: ALL Target: ALL

Real-life experiences; users helping users. Be a part of it all at this interactive round table. Learn from each other, and find new ways to make your life easier. Bring your questions, comments, and your own best practices to this round table session.

Course #4211

BenefitPoint

Using BenefitPoint As a Sales Tool

Level: ALL Target: ALL

Did you know BenefitPoint has a fully integrated sales functionality? Discover why BenefitPoint is the only sales tool you need. Learn how to upload prospects, track and report on sales opportunities, integrate with Sagitta, AMS360, WorkSmart, Outlook, and more.

Course #4212

BenefitPoint

RTM-Managing Agency's Rev Through Reporting - Part 2

Level: ALL Target: ALL

In Part 2, learn how to use RTM to track revenue, monitor commission payouts to producers, and identify top carriers and producers.

PREREQ Attend Course #4112

Course #4221

Principal Connection

Round Table: Executives/Carriers

Level: ALL Target: AP

The goal of this session is to provide a vehicle for open communication among carriers, agencies and Vertafore to enable representatives to discuss key insurance automation priorities, and develop ideas to move these initiatives forward.

Course #4222

Principal Connection

Growth By Improving Your Digital Marketing

Level: ALL Target: AP

See how easily you can improve retention and generate more prospects, more clients and more growth by improving your digital marketing. This innovative executive level session is designed for agency principals with strategies that really work today and a blueprint for leading your organization to a new level of success in the digital world. You're sure to come away with a better understanding of the critical marketing principles, an integrated approach to your digital marketing strategy, and five simple improvements you can implement immediately to ensure new prospects will choose you over your competitors. The Consumer Agents Portal (CAP) is possibly the largest single effort within the Independent Agency System to level the playing field for online marketing.

Martin P. Agather, CPCU, ARM Entrepreneurial Advantage Consultant

Course #4231

Sagitta

Is Your Money Safe? - Part 2

Level: ALL Target: ACCT

This session is a continuation of Course #4131. We will discuss banking service options for Positive Pay, ACH payments, Lockbox upload, and reconciliation between the bank and Sagitta. Learn how other agencies are using web services and other options to accomplish this. This session counts as an Elective Class toward the NetVU Accounting Certification. You must attend both Parts 1 and 2 for the credit.

PREREQ For the Accounting Certification Only - must attend Course #4131

Course #4232

Sagitta

Day in the Life of a CSR - Part 2

Level: ALL Target: CSR

In this session, a continuation of Course #4132, we will continue with the discussion of how policy data flows, where it is stored, the use of agency defined data, the use of client level units at risk, and the importing and exporting of policy information. This is Part 2 of 4-part series, but is not a prerequisite for Parts 3-4.

PREREQ While Part 1 is not a prerequisite, you may find Part 2 more valuable if you attend Part 1.

Course #4233

Sagitta

How Are Trainers Training Staff?

Level: ALL Target: ALL

No matter how intuitive a system may be, training is essential to get the most out of it. How you impart that knowledge is critical to your success. This session is an opportunity for you to share your ideas on what works best for you as a trainer, and to learn from others. How do you organize the training? Do you work on the live system or a test? How is Vertafore University and NetVU University integrated into your training? What are your follow up procedures? These topics and more will be discussed.

Course #4241

TECH

Making Your Producer Mobile

Level: TECH Target: IT, SA

What can you do to get your producers on the road, looking professional, and carrying the information they need in hand? Discussion of presentation tools, mobile devices, and desktops geared toward those on the move.

Course #4251

WorkSmart

Effective Marketing in WorkSmart

Level: ALL Target: ALL

Learn to track your marketing activity with WorkSmart's Marketing/Submission workflow and features. We'll demonstrate how Submission workflow can maximize reporting with marketing scenario examples, and how your staff can set up the system to view past marketing activity. You'll see how to use Business Process Reporting (BPR) to run marketing reports.

2:15 p.m. – 3:30 p.m.

Course #4301

AMS360

AMS360 - The Next Generation of AMS360

Level: ALL Target: ALL

NextGen will bring many changes to your agency. This class will show you the benefits, and give you an in-depth view of those changes so you will know how to find and work with this newest version.

Course #4302

AMS360

Using Sales Center to Generate Revenue - Part 1

Level: ADV Target: AP, CSR, OM

We all know there's money to be made with account rounding, retention, and workflow efficiencies. In this two-part session, find out how to use the Sales Center to generate revenue. Become consistent with correct data entry, analyze your data to develop meaningful target lists, and watch your results soar. This is Part 1 of a 2-part series, and is a prerequisite for attending Course #5203.

Course #4303

AMS360

Sales and Specialty Apps

Level: ADV Target: ALL

Hear how AMS360 can increase your sales, improve the efficiency of your CSRs, and make your producers more effective.

Course #4304

AMS360

Round Table: Connectivity and Download

Level: ALL Target: CSR, OM, SA

Connectivity and download are the life blood, and future of the agencies. Learn how connectivity with multiple products and download can make your lives easier. Bring your toughest, most pressing questions about connectivity and download relevant to AMS360. This round table includes a guided discussion, and peer to

peer learning to help your agency take advantage of connectivity and download.

Course #4311

BenefitPoint

Best Buddies: BBI and Excel

Level: ALL Target: ALL

As requested, learn how to make your reports work for you by using BenefitPoint Business Intelligence (BBI). This class focuses on Excel tips and tricks, using formulas and Macros, to automate reporting and formatting into your custom view.

Course #4321

Principal Connection

Discover Innovative Ways to Grow Agency's Top Line

Level: ALL Target: AP

Is driving top line growth and how you are going to achieve it keeping you up at night? Agencies need to focus on growing their top line, which means concentrating on increasing sales, and providing a superior experience so their customers return year after year and buy more. Find out how executives at winning agencies use innovative best practices as crucial drivers of their business growth strategy, exceed their targets daily...and rest well at night.

TBD

Course #4322

Principal Connection

Developing the Next Generation of Producers

Level: ALL Target: AP

Learn the answer to the million dollar question: "How do you recruit and develop a million dollar producer?" This session will include key characteristics of a high potential candidate; essential agency roles and responsibilities; technical and sales consultative training; developing and maintaining pipeline activities; and proven tools to drive and exceed sales goals.

Jennifer DeMello-Johnson Agency Services Group

Course #4331

Sagitta

Direct Bill - Soup to Nuts - Part 1

Level: INT Target: ACCT, SA

In a direct bill workflow, it is critical to accurately track commissions by clients, policies and/or carriers, as well as on the agency financial reports. Using the new direct bill download process can save agencies an incredible amount of time, but how does it work, and what does it give you? Part 1 of this 2-part series focuses on the personalization, or set-up, you will need to do in order to process direct bill transactions. This session counts as a

Core Class toward the NetVU Accounting Certification. You must attend both Parts 1 and 2 for the credit.

Course #4332

Sagitta

Integration With Sagitta and BenefitPoint - Part 1

Level: ALL Target: BA, SA

This 2-part series will provide you with the guidance to successfully implement the integration, and concentrate on the personalization of your systems to enhance data flow between BenefitPoint and Sagitta.

Course #4333

Sagitta

60 Tips in 150 Minutes - Part 1

Level: ALL Target: ALL

This popular session is back again valuable to all users to spread the wealth of knowledge by giving you 60 new tips and tricks! Learn shortcuts with fewer key strokes, and other ways to move faster within Sagitta, as well as hearing tips about non Sagitta applications. To give the educators more time to explain these tips, this topic has been expanded into two sessions. This is Part 1 of 2, but is not a prerequisite for Part 2.

Course #4341

TECH

Information Security - Part 1

Level: TECH Target: IT, SA

Brush up on information security key terms and concepts. Catch some new ideas on where and how to focus your agency, and its security culture. Get up-to-speed on the latest trends in attacks and security.

Course #4351

WorkSmart

WorkSmart Implementation Process

Level: ALL Target: ALL

Learn how to plan for implementation, manage change, and encourage your team. What does a WorkSmart implementation look like? What does a standard timeline look like? Are you implementing a management system too? What are considerations before beginning? How will my users adapt? What are the common implementation challenges?

3:45 p.m. – 5:00 p.m.

Course #4401

AMS360

E&O Pitfalls With Certificates of Insurance

Level: ALL Target: ALL

Certificates of Insurance are the minefield of E&O issues. This session covers what works (and doesn't) in avoiding errors and omissions when working with

certificates of insurance. Find out who can issue certificates, what can be issued, and what can and cannot be said. Learn how to avoid common mistakes with certs and the proper use of AMS360 along with the correct workflows that can significantly reduce your agency's E&O exposure. This sessions counts towards the NetVU Account Manager Certification - NCiAM.

Course #4402
AMS360

Using Sales Center to Generate Revenue - Part 2

Level: INT Target: AP, CSR, OM

The second part of this series will show you how to set up campaigns, how to fill in the missing coverage, and how to integrate with 3rd party software. Not just how to 'fill in,' but how to identify where coverage is missing or where lines of business are missing/could be added, identify cross sell opportunities, and lead list import.
PREREQ Attend Course #4302

Course #4403
AMS360

Where Is Your Money?

Level: ALL Target: CSR

This session will cover how to manage premiums through AMS360. What do the "cost" and "billed" premiums mean in the AMS360 screens? Where do they come from? This session will demystify premiums, and help you manage finances more effectively. This session counts towards the NetVU Account Manager Certification - NCiAM.

Course #4404
AMS360

Round Table: Advanced Accounting

Level: ALL Target: ACCT

This round table session is key for those with advanced accounting questions. Take this opportunity to ask your questions with comparable size agencies.

Course #4411
BenefitPoint

Beyond BBI-Think Outside the Box (Repeat)

Level: ALL Target: ALL

Reporting is how we communicate. Make sure your reports are sending the right message. Learn how to customize your reports to suit your specific needs. Understand how reports are populated, manage parameters, set field names, and create subscriptions to put the information you need at your fingertips.

Course #4412
BenefitPoint

Happy Trails: Navigating Your Way to Success

Level: BASIC Target: ALL

Are you new to BenefitPoint? Learn tips for navigation, multiple search options, and advanced search. Work with renewal calendars, filtering, the alpha wizard, exporting to Excel, and lots more. You'll be guided through this roadmap in real time with actual live application screens.

Course #4421

Principal Connection

Discover the Value of Online Client Self-Service

Level: ALL Target: AP

Learn how your peers are utilizing online access and client self-service to increase customer satisfaction, and streamline agency productivity. During this panel discussion you will learn how customer self-service adds value to your website, leveraging the power of the Internet for sales and client services. You will also hear about the exciting mobile optimized web services these agents are extending to their clients and discover how you can add these tools into your customer service strategy.

Artizan Internet Services

Course #4422

Principal Connection

How to Avoid the Potholes in M&A

Level: ALL Target: AP

Hindsight is 20-20. In retrospect, many agency sellers look back and realize they left money on the table because they did not properly prepare their businesses in advance for the sale. We will discuss the most common mistakes agency sellers make, and proper preparation to ensure the agency is as attractive as possible to the buying community so it fetches the highest possible price.

Tom Doran Reagan Consulting Inc.

Course #4431

Sagitta

Direct Bill - Soup to Nuts - Part 2

Level: INT Target: ACCT, SA

Continuing with direct bill, Part 2 will discuss processing and reporting options. Different methods of handling direct bill commissions will be covered, including the new direct bill statement download, and commission statement import from Excel. Agency principals must have accuracy in tracking and reporting direct bill commissions in order to make important business decisions. Come to this session to make sure you are aware of all of your direct bill options. This session counts as a Core Class toward the NetVU Accounting Certification. You must attend both Parts 1 and 2 for the credit.

PREREQ For the Accounting Certification Only - must attend Course #4331

Course #4432

Sagitta

Integration With Sagitta and BenefitPoint - Part 2

Level: ALL Target: BA, SA

This is Part 2 of a 2-part series which will focus on processes and procedures to improve workflows related to the BenefitPoint - Sagitta integration.

PREREQUISITE: : While Part 1 is not a prerequisite, you may find Part 2 more valuable if you attend Part 1.

Course #4433

Sagitta

60 Tips in 150 Minutes - Part 2

Level: ALL Target: ALL

This is a continuation of Course #4333. This is Part 2 of a 2-part series, but Part 1 is not a prerequisite for Part 2.

Course #4441

TECH

Information Security - Interactive - Part 2

Level: TECH Target: IT, SA

This is a continuation of Course #4341 this time in action. See tools you can use to diagnose network and end-point vulnerabilities, and witness live attempts to compromise an environment.

Saturday, April 28

8:15 a.m. – 9:30 a.m.

Course #5101

AMS360

Top Seven Accounting Mistakes/Issues

Level: INT Target: ACCT, AP

This session will cover the Top Seven Accounting Mistakes, and we'll leave time at the end for your input.

Course #5102

AMS360

Wanted: Paperless Office

Level: INT Target: ALL

Something to think about....Did you know professionals spend 5-15% of their time reading information, but up to 50% looking for it. What's it cost? The average office worker uses 10,000 sheets of copy paper each year. The typical worker spends an average of 150 hours per year looking for lost documents. Learn the difference between content management (scanning and eliminate a file), and document management (how we work with Doc360). Learn the four critical 'must haves,' and how to get your staff on board to GO PAPERLESS.

Course #5103

AMS360

System Admin - Part 1

Level: INT Target: IT, SA

This two-part session will provide a detailed review of roles and responsibilities for systems administrators. You'll learn about preparing for upgrades, optimizing hardware, and how to work with the eForms library and ACORD form setups. We'll also include tips and tools for system setups including Setup Assistant, and security groups. This session counts towards the NetVU Account Manager Certification - NCiAM. This is Part 1 of a 2-part series, and is a prerequisite for attending Course #5203.

Course #5104

AMS360

Advantages of Integrating Products

Level: ALL Target: ALL

Vertafore products are designed to work together seamlessly. This session will show you how Vertafore PL Rating, TransactNOW, WorkSmart, BenefitPoint, and much more work together in an integrated, comprehensive system.

Course #5111

BenefitPoint

Feedback Forum...Is Anyone Listening?

Level: ALL Target: ALL

At this session you will get involved, let your voice be heard, and perhaps influence the direction of BenefitPoint. This interaction will give you a forum to question, comment, and brainstorm ideas with Vertafore product management and the newly created R&D Committee.

Course #5121

Principal Connection

Generating Real Business Via Blogging

Level: ALL Target: AP

This session looks at real world insurance agency case studies, and demonstrates how blogging on a regular basis can generate solid website traffic and allow independent insurance agencies to dominate specific insurance niches. The class is meant to give participants a clear game plan and best practices for blogging.
John Boudreau Astonish Results

Course #5122

Principal Connection

Predictable Producer Success

Level: ALL Target: AP

How is your sales team doing? This course will teach you how to put a Sales Process Map in place to accelerate sales activities, eliminate obstacles, and easily track activities. You will also learn how to identify

early signs of success or failure, so you can address concerns quickly. Lastly, this session will take on the sixteen call reluctance concerns salespeople often cite, and teach you how to manage and overcome them in your agency.

Thomas Redmond, Jr. Redmond Group, Inc

Course #5131

Sagitta

Where's Your Money - Part 1

Level: ALL Target: ACCT

Bring your coffee and join us in this 2-part series, looking in depth at general ledger packages, personalization, reporting options, dashboards, etc. This session counts as an Elective Class toward the NetVU Accounting Certification. You must attend both Parts 1 and Part 2 for the credit.

Course #5132

Sagitta

Day in the Life of a CSR - Part 3

Level: ALL Target: CSR

Parts 3 and 4 of this series will cover the ins and outs of ACORD Forms, eForms, certs and binders, as well as proposals and letters. Also, you will learn how to use commercial download data, more about reporting, where TransactNOW comes in to the equation, and what happens to the data when you invoice. This is Part 3 of a 4-part series, and is a prerequisite for Part 4.

Course #5133

Sagitta

Personalization From A to Z - Part 1

Level: ALL Target: ADV

The first two parts of this series will focus on the "non accounting" personalization and maintenance setup which will provide your agency significant benefits, if done correctly. Old and new system setups, aligning business processes between system administrators and users to optimize system utilization. Come away from this session with a flowchart of what will happen, and what you need to consider with personalization. These in depth sessions will review Sagitta personalization for policy and integration. Understanding how it works will give you the tools necessary for proper reporting output, preparing for integration, and improve your data integrity. This is Part 1 of a 4-part series, but is not a prerequisite for Part 2.

Course #5141

TECH

The Transparent IT Department

Level: TECH Target: IT, SA

An organization's perception of IT is not easy to control, but there are communication strategies that can help

remove the veil of "what IT does." Help Desk procedures, project, and process management are just some of the tools that can improve the impact IT has on your business.

Course #5151

WorkSmart

BPR How To

Level: ALL Target: ALL

The value of your reports depends on the quality of the data and your understanding of workflows. Learn how to make Business Process Reporting (BPR) support the needs of your business.

11:15 a.m. – 12:30 p.m.

Course #5201

AMS360

DocDesigner - Beyond the Basics! - Part 1

Level: ADV Target: ALL

This two-part session will show you how to unleash the power of the DocDesigner tool and Word enhancements. You will learn basics like creating simple merge field templates, and schedule/proposal/summary documents. You will also gain an understanding of the elements required to build the documents, including merge field templates and pattern documents. Find out how to make data flow to documents, creating powerful schedules and proposals. Learn to take documents to the next level by adopting further modifications, such as adding a cover page, introductions, and back pages; adding merge fields; inserting section/page breaks, text between bookmarks, and fill-ins; and formatting. This sessions counts towards the NetVU Account Manager Certification - NCiAM. You must attend Parts 1 and 2 for the credit.

Course #5202

AMS360

Troublesome Reports

Level: INT Target: ACCT, AP, CSR

Discover the top five most commonly misunderstood reports - chosen based on service call logs from support. Which reports are the most challenging to understand? Learn where data pulls from, and how to keep it clean.

Course #5203

AMS360

System Admin - Part 2

Level: INT Target: IT, SA

The second part of this series will focus on essentials for maintaining and upgrading programs integrated with AMS360, such as TransactNOW, Producer Plus, BenefitPoint, PL Rating, and DocDesigner. This session

counts towards the NetVU Account Manager Certification - NCiAM.
PREREQUISITE: : Attend Course #5103

Course #5204
AMS360

Round Table: Workflows

Level: ALL Target: ALL

Every agency has some form of workflows they follow in their agency. Find out how others are using AMS360 and document management workflows. Bring your questions, experiences, and best practices solutions to this round table discussion. Learn from others how they implemented workflows in their agency, and what efficiencies they have gained.

Course #5211

BenefitPoint

BP and IT: Perfect Together

Level: ALL Target: ALL

In this brand new session, learn how BenefitPoint works seamlessly with other technology. Discover how easy it is to integrate with Outlook, and optimize web services and other external resources. Understand how integrating these services help to streamline your processes.

Course #5212

BenefitPoint

BenefitPoint Bootcamp for Broker Admins (Repeat)

Level: ALL Target: ALL

Become a BenefitPoint Specialist. Learn the best practices for successful adoption, implementation, and optimal utilization of the system. Save time with an efficient set up strategy establishing naming conventions and field requirements, setting agency permissions, understanding how to handle integration, and preparing data standard requirements for benchmarking.

Course #5221

Principal Connection

Best Practices for Agency Perpetuation

Level: ALL Target: AP

This workshop will explore why agencies fail to properly address perpetuation, and what they can do to pattern their plan with the best results in mind. We'll discuss agency objectives for a perpetuation plan, why developing the next generation is key, and how adjusting the plan over time keeps the process on track.

Paul Martin, CPCU PZ Martin Education

Course #5222

Principal Connection

Cash, Kudos or Pizza-Just What Motivates Your Staff

Level: ALL Target: AP

You've heard the statistics from polls. You've heard grumblings in your break room. You've tried to motivate your staff, but you still feel you are missing the mark. This class will demystify determining what motivates your team. Take a look at your style, as well as roles and motivators for individuals on your team. We will help you identify how to best address members of your team and keep everyone motivated through communication, skills assessments, and team building.

Carletta Neal The Omnia Group Valerie Harwell The Omnia Group

Course #5231

Sagitta

Where's Your Money - Part 2

Level: ALL Target: ACCT

As we continue our search for your agency's money, the focus turns away from accounting to your client database. Do you know what coverages you are not writing for your existing clients? Your Sagitta system is a substantial investment, and should be a valuable resource to your sales team to identify account rounding and cross selling opportunities all ways to grow your business, and add more money to the bottom line! This session counts as an Elective Class toward the NetVU Accounting Certification. You must attend both Parts 1 and 2 for the credit.

PREREQUISITE: : For the Accounting Certification Only - you must attend Course #5131.

Course #5232

Sagitta

Day in the Life of a CSR - Part 4

Level: ALL Target: CSR

This is a continuation of Course #5132.

Prerequisite : Attending Course #5132

Course #5233

Sagitta

Personalization From A to Z - Part 2

Level: ADV Target: ALL

This is a continuation of Course #5133

Prerequisite: While Part 1 is not a prerequisite, you may find Part 2 more valuable if you attend Part 1.

Course #5241

TECH

ITIL - Framework and Qualifications

Level: TECH Target: IT, SA

ITIL advocates that IT services must be aligned to the needs of the business, and underpin the core business processes. Learn how you can benefit from certification in the most widely adopted approach for IT Service Management.

Course #5251

WorkSmart

WorkSmart Engage - How Can It Help Your Business?

Level: ALL Target: ALL

Today's agencies need a way to stem productivity lost through the inefficient exchange of information via emails, faxes, and ftp sites for complex and high value business. Engage, a WorkSmart module, is a secure SaaS content collaboration tool, providing secure workspaces to organize renewal, submission, and client documents/communications. Centralized data aggregation, and collaboration tools enable internal and external collaboration with colleagues, clients, and carriers.

2:15 p.m. – 3:30 p.m.

Course #5301

AMS360

DocDesigner - Beyond the Basics! - Part 2

Level: ADV Target: ALL

This is a continuation of session #5201. This session counts towards the NetVU Account Manager Certification - NCiAM. You must attend Parts 1 and 2 for the credit.

Prerequisite: : Attend Course #5201

Course #5302

AMS360

Renewal List Tool

Level: INT Target: CSR, OM

Get the most out of the renewal list tool. Learn how the feature was designed; the outside the box uses; and how to maintain renewal notes throughout the year for better renewal retention, marketing, and submissions. This session counts towards the NetVU Account Manager Certification - NCiAM.

Course #5303

AMS360

WorkSmart-More Than a Document Management System

Level: INT Target: ALL

Learn how to make WorkSmart work for you: reducing costs, increasing security, and providing your agency with seamless disaster recovery. Driven by the data in your management system, WorkSmart provides the intelligent workflows you need to automate processes to become more efficient. Discover how it increases capacity by ensuring you always have the right people on the right tasks.

Course #5304

AMS360

Where to Find Your Data

Level: BASIC Target: ACCT, AP, CSR

Where is my data? Have you ever spent way too much time searching for it? This session will walk you through using Sales Center to verify your data, and learn where it goes. You will also learn how to clear up data in AMS360, and keep it clean.

Course #5311

BenefitPoint

Beyond BBI-Think Outside the Box (Repeat)

Level: ALL Target: ALL

See Course #4411 for description.

Course #5312

BenefitPoint

BenefitPoint Bootcamp for Broker Admins (Repeat)

Level: ALL Target: ALL

See Course #5212 for description.

Course #5321

Principal Connection

Drive Producer Results With Ins. Sales Management

Level: ALL Target: AP

While many insurance agencies have processes in place to move a sale through the appropriate steps to issuing a policy, they lack the technology to effectively manage the sales process. This deficiency may not immediately seem critical to some, but it is only when agencies are able to track and manage the sales processes that they are able to understand their strengths and weaknesses as an organization, and influence future sales performance. Let us share how using a sales management system designed specifically for insurance agencies can forecast, manage and drive sales, and produce results like never before.

Paul Areida Vertafore

Course #5322

Principal Connection

Business Drivers for Marketing Online

Level: ALL Target: AP

Being active on social media has become critical to the growth of any business. You've heard all of the reasons

why an online presence is important, but you may still not understand how to execute an effective online marketing campaign through social media. Using concrete examples from other agents like you, this laser focused session will offer you guidance for each of the most critical online channels where your customers are active. You will learn how to establish your social media presence and learn how to leverage these tools to reach your target customers to grow your business.

Katie Herbst Peet, CISR, CIC Westfield Insurance Dale Steinke Safeco Insurance Company

Course #5331

Sagitta

Life Cycle of An Accounting Transaction

Level: ADV Target: ACCT

Get a clear understanding of an accounting entry's life cycle. Follow a transaction from the personalization setup, to posting into the general ledger, and ultimately reporting. Understanding the process will give you auditing tips to reduce errors and redundancy. This session is a Core Class toward the NetVU Accounting Certification.

Course #5332

Sagitta

WorkSmart for Sagitta

Level: INT Target: ALL

This class will aid both system administrators and users to understand the many benefits this solution offers, including integration, content management, intelligent workflows, and business process reporting. WorkSmart is a Vertafore solution designed specifically for agencies and gives agencies unprecedented insight to impact key business metrics on a daily basis.

Course #5333

Sagitta

Personalization From A to Z - Part 3

Level: ADV Target: ALL

Parts 3 and 4 of this topic will concentrate on the personalization and maintenance setup for accounting. Whether you are a new system user or have been using Sagitta for some time, reviewing and updating your system personalization may find significant benefits. This session, if taken with Course #5433, is a Core Class toward the NetVU Accounting Certification. You must attend both Parts 3 and 4 for the credit.

Course #5341

TECH

Integration Strategies

Level: TECH Target: IT, SA

Hear about new design concepts and development strategies for approaching personalized development

initiatives. Follow a case study of integration between Salesforce.com and Sagitta.

3:45 p.m. – 5:00 p.m.

Course #5401

AMS360

Advanced Invoices

Level: ADV Target: ACCT, AP

This class is designed to take the hassle out of invoicing. In this session you will learn agency billing, a portion of a direct bill policy, eliminating unbilled policy problems, create custom payment plans, how to best bill agency fees, and reviewing previous billed installment invoices.

Course #5402

AMS360

Producer Plus - Tips and Tricks

Level: ADV Target: ALL

Learn how to use Producer Plus to increase productivity and sales, and offer the best customer service in today's 24/7 environment.

Course #5403

AMS360

Be a Part of the R&D for a Day

Level: ADV Target: ALL

At this session you will get involved, let your voice be heard, and perhaps influence the direction of AMS360. This interaction will give you a forum to question, comment, and brainstorm ideas with Vertafore product management.

Course #5411

BenefitPoint

The Power of Networking

Level: ALL Target: ALL

Networking is one of the greatest benefits of the NetVU Conference. This session creates a unique opportunity to meet with other BenefitPoint users to discuss successes and pain points. This is the place to learn real world tips and tricks you can implement immediately at your agency.

Course #5421

Principal Connection

Marketing Fundamentals: Communicate Competitive Edge

Level: ALL Target: AP

Are you overwhelmed with the amount of marketing advice you receive? Don't be! This fast-paced, nuts and bolts session will break down the marketing process, and help you create a simple and focused agency marketing plan. Participants will learn how to market so your customers will buy, five key components of a

successful marketing plan, five strategies to effectively communicate your message, and more.

Emily Huling, CIC, CMC Selling Strategies Inc.

Course #5431

Sagitta

Accounting Tips and Tricks

Level: INT/ADV Target: ACCT

Do you want to ramp up your use of Sagitta? Learn tips and tricks to improve your productivity, and the efficiencies of your accounting staff. Learn from those that have "been there and done that." This session is an elective for the NetVU Accounting Certification.

Course #5432

Sagitta

Coming Attractions (Repeat)

Level: ALL Target: ALL

See Course #4133 for description.

Course #5433

Sagitta

Personalization From A to Z - Part 4

Level: ADV Target: ALL

This is a continuation of Course #5333. This session counts as a Core Class toward the NetVU Accounting Certification. You will need to attend both Parts 3 and 4 for the credit.

Prerequisite: For the Accounting Certification Only, you must attend Course #5333

Course #5441

TECH

Open MIC

Level: TECH Target: IT, SA

Your turn at the mic! We have some topics, but we know you do too. Join this lively group of IT professionals in an open forum discussion.
