NC2017 Education Breakouts

As of March 5, 2017

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# AMS360/Vertafore Agency Platform

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** AMS212 **Room:** 205A-C

**Session Title:** Using your data

**Description**: Target list, campaigns,

***Audience:*** *Admin; Account Manager* ***Format:*** *Presenter*

***Presenters:*** *Kerri Urrutia-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** AMS213 **Room:** 207A-D

**Session Title:** VSSO-Enabled – Admin, New Employee Set-Up and On-boarding

**Description**: Administration features and functionality are NECESSARY for all roles in the agency. Whether you are in charge of implementation or using the system you need to know and understand how to implement and WHAT the system you may be capable in your agency.Onboarding includes new hire checklist/termination checklist, Security Group Set up

***Audience:*** *Admin; Account Manager* ***Format:*** *Side by Side*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Nellie Massoni-Vertafore, Val Hamry-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** AMS211 **Room:** 208AB

**Session Title:** Accounting for CSRs

**Description**: Join this session to discover just how much accounting impacts your day-to-day work servicing clients. See a review of the Register, Invoice and Company Tabs - they are all affected by what goes into each client's account. We'll review handling anddocumenting checks and other payments, and will demonstrate ways to cut down research time as well as protect the agency from E&O claims. Learn how the Billed and Cost columns work together to show the full picture of your client'sbillings, and find out what makes a transaction show up on the Unbilled Policy Report. And finally, we'll discuss best practices for handling Cancellation Date changes in the system. Find out the importance of consistent data entry to reporting.

***Audience:*** *Accounting* ***Format:*** *Presenter*

***Presenters:*** *Janet Tuttle-TDECU*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** AMS224 **Room:** 205A-C

**Session Title:** Your BIG DATA

**Description**: Spend this hour finding out how your data can report via the new Executive Dashboards in Vertafore Agency Platform

***Audience:*** *Admin; Account Manager* ***Format:*** *Presenter*

***Presenters:*** *Joann MacCaul-Vertafore, Kerri Urrutia-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** AMS223 **Room:** 207A-D

**Session Title:** VSSO-Enabled-Admin; DOC360 Set up and Integration; Renewal List and Expiring Policies

**Description**: Retention and customer experience are key to our agency experience. Learn the possibilities from a document and renewal perspective.

***Audience:*** *Admin; Account Manager* ***Format:*** *Side by Side*

***Presenters:*** *TBD*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** AMS222 **Room:** 208AB

**Session Title:** Your Accounting Basis is Set: Now What?

**Description**: Your accounting basis is set and maybe you didn’t make the decision. What Now? This discussion will center around how this “once and done” setup affects your Balance Sheet, P&L, production and invoicing.

***Audience:*** *Accounting* ***Format:*** *Presenter*

***Presenters:*** *Lorraine Plezia-Vertafore, Melissa Kwasniewski*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** AMS221 **Room:** 209A-C

**Session Title:** CL & PL Download - Set Up And Getting Started, Part 2

**Description**: Learn how to make your own download plan for your agency and see how YOUR settings are affecting your use of data efficiency

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Laurie Gillam-Gardiner Allen DeRoberts Insurance, Nellie Massoni-Vertafore, Kristin Hicks-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** AMS233 **Room:** 207A-D

**Session Title:** My Agency Home - Bring Your Agency and Client Hat for this Tour of Your New Work Home, Part 1

**Description**: How does the life of platform change your customer experience? In session one we will talk about HOW to take the plunge. We will walk through the functionality and how to transition

***Audience:*** *All* ***Format:*** *Side by Side*

***Presenters:*** *Kerri Urrutia-Vertafore, Monica McCool- Vertafore, Eric Helzer-Vertafore, Dave Bevan-Vertafore, Jeff Parrish-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** AMS232 **Room:** 208AB

**Session Title:** Accounting for Bookkeepers

**Description**: Join Janet for this popular Accounting Best Practices session, where you'll see a review of important month-end procedures, including reports to run and accounts to balance. Learn the how and why of voiding Direct Bill Statements.See a demonstration of building an Account Current that includes items from Conversion Beginning Balances. And, hear Janet's recommendations for bank reconciliations and how to document your work in AMS360.

***Audience:*** *Accounting* ***Format:*** *Presenter*

***Presenters:*** *Janet Tuttle-TDECU*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** AMS231 **Room:** 209A-C

**Session Title:** PART 2 Cl & PL Download - setting up / starting

**Description**: Download effects both policy data and accounting, take a deep dive into the setting and why your data is what you receive

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Laurie Gillam-Gardiner Allen DeRoberts Insurance, Nellie Massoni-Vertafore, Kristin Hicks-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** AMS242 **Room:** 207A-D

**Session Title:** My Agency Home - Bring Your Agency and Client Hat for this Tour of Your New Work Home, Part 2

**Description**: Continued ROUND table discussion on functionality that is focused on what you need to know to use the functionality as completely as possible

***Audience:*** *All* ***Format:*** *Side by Side*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Kerri Urrutia-Vertafore, Monica McCool- Vertafore, Eric Helzer-Vertafore, Dave Bevan-Vertafore, Jeff Parrish-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** AMS241 **Room:** 208AB

**Session Title:** How to find out what is happening in your agency

**Description**: Can you comfortably say that you have your finger on the pulse of all the accounting activity in your agency? If you can't, maybe you should spend the next hour in this session!

***Audience:*** *Accounting* ***Format:*** *Presenter*

***Presenters:*** *Lorraine Plezia-Vertafore, Janie Ussery-Ragland Strother & Lafitte*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** AMS251 **Room:** 205A-C

**Session Title:** Admins need to know

**Description**: Daily process, Audit trails, Apps lock, Mandatory field setup, leadlist administration …

***Audience:*** *Admin; Account Manager* ***Format:*** *Presenter*

***Presenters:*** *Heather Donley-Stolly Insurance, Val Hamry-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** AMS252 **Room:** 207A-D

**Session Title:** Migrate Your AMS360 Processes and Workflows to Vertafore Agency Platform For an All-Day Platform Experience, Part 1

**Description**: Join this session to see first-hand how your current AMS processes and workflows can be migrated to Vertafore Agency Platform components that will allow you to be more efficient, have better insight into thework flowing through the agency, and allow you to work exclusively in Platform on a daily basis.

***Audience:*** *All* ***Format:*** *Round Table*

***Presenters:*** *Joyce Sigler-Jones-Wenner*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** AMS263 **Room:** 107AB

**Session Title:** Sales Track-Intro

**Description**: Sales Track-Intro

***Audience:*** *All/Sales* ***Format:*** *Presenter*

***Presenters:*** *Eric Helzer-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** AMS262 **Room:** 205A-C

**Session Title:** Admins and the Purge utility

**Description**: The purge utility will permanently delete customers and data from AMS360, allowing you to clean up your system, as well as comply with regulations such HIPAA. Let's talk about how it can help you.

***Audience:*** *Admin* ***Format:*** *Presenter*

***Presenters:*** *Lorraine Plezia-Vertafore, Russ Turrentine*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** AMS261 **Room:** 207A-D

**Session Title:** Migrate Your AMS360 Processes and Workflows to Vertafore Agency Platform For an All-Day Platform Experience, Part 2

**Description**: The discussion continues....Let’s start with the basics of QuickNavs. Understanding the functionality, understanding building, implementing.

***Audience:*** *All* ***Format:*** *Side by Side*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Kerri Urrutia-Vertafore, Kevin Pham-Vertafore, Dave Bevan-Vertafore, Kurt Williams-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** AMS313 **Room:** 201AB

**Session Title:** Sales Track-Deep Dive

**Description**: Sales Track-Deep Dive

***Audience:*** *All/Sales* ***Format:***

***Presenters:*** *Eric Helzer-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** AMS312 **Room:** 207A-D

**Session Title:** VAP QuikNavs-Configuration and Utilization for Maximum Results, Part 1

**Description**: You've implemented VAP, so now its time to position your staff to take full advantage of one of its most powerful features - QuikNavs. In this session, we'll discuss Setups and Configuration, impact on workflows through WorkQues, howadditional Vertafore Products come into play. Learn the questions you need to ask before you get started, and how effective monitoring of the results will give users and clients the best possible experience.

***Audience:*** *All* ***Format:*** *Side by Side*

***Presenters:*** *Kerri Urrutia-Vertafore, Dave Bevan-Vertafore, Jeff Parrish-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** AMS311 **Room:** 209A-C

**Session Title:** Connectivity - Data Download

**Description**: Download sets up, tips, tricks and updates

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Nellie Massoni-Vertafore, Kristin Hicks-Vertafore, Cal Durland-IVANS*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** AMS323 **Room:** 207A-D

**Session Title:** VAP QuikNavs-Configuration and Utilization for Maximum Results, Part 2

**Description**: The discussion continues...You've implemented VAP, so now its time to position your staff to take full advantage of one of its most powerful features - QuikNavs. In this session, we'll discuss Setups and Configuration, impact on workflows throughWorkQues, how additional Vertafore Products come into play. Learn the questions you need to ask before you get started, and how effective monitoring of the results will give users and clients the best possible experience.

***Audience:*** *All* ***Format:*** *Side by Side*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Kerri Urrutia-Vertafore, Dave Bevan-Vertafore, Monica McCool-Vertafore, Jeff Parrish-Vertafore, Eric Helzer-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** AMS322 **Room:** 208AB

**Session Title:** Accounting Tips & Tricks

**Description**: You’ve been doing accounting in AMS360 for a while now and you feel pretty comfortable. Ready to shake up the “old way of doing things?” We will discuss ways to automate some of those accounting processes, tips for fewer steps andmaybe even remind you about decisions you put off until you had learned the system.

***Audience:*** *Accounting* ***Format:*** *Presenter*

***Presenters:*** *Lorraine Plezia-Vertafore, Melissa Kwasniewski*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** AMS321 **Room:** 209A-C

**Session Title:** Connectivity - eSignature

**Description**: Why, Compliance, Workflow, Procedure

***Audience:*** *All* ***Format:*** *Demo/Round Table*

***Presenters:*** *Laurie Gillam-Gardiner Allen DeRoberts, Ron Berg-ACT*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** AMS331 **Room:** 207A-D

**Session Title:** Reporting Options

**Description**: My Agency reports, Classic Reports, Scheduled reports …. Data data data … how to work your data

***Audience:*** *All* ***Format:*** *Side by Side*

***Presenters:*** *Kurt Williams-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** AMS333 **Room:** 208AB

**Session Title:** Connectivity - Making ReferenceConnect work for you

**Description**: The best reference guides in your agency at your finger tips, day in the life use of reference connect

***Audience:*** *Admin; Account Manager* ***Format:*** *Presenter*

***Presenters:*** *Monica McCool-Vertafore, Joyce Sigler-Jones-Wenner, Laurie Gillam-Gardiner Allen DeRoberts Insurance*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** AMS332 **Room:** 209A-C

**Session Title:** AMS360-are you using all the features?

**Description**: AMS360-are you using all the features?

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Cathy Hall-Forest Agency insurance*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** AMS413 **Room:** 205A-C

**Session Title:** Schedules & Proposals, Part 1

**Description**: Three-part presentation that covers all aspects of AMS360's DocDesigner system used to create and edit Schedules & Proposals, Part 1

***Audience:*** *Admin, Account Manager* ***Format:*** *Presenter*

***Presenters:*** *Angela Painter-Angela Adams Consulting*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** AMS412 **Room:** 207A-D

**Session Title:** What's New Peek Under the Covers REPEAT

**Description**: Overview of items currently in development

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Kerri Urrutia-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** AMS411 **Room:** 208AB

**Session Title:** The mystery of agency / producer licensing

**Description**: Simplifying your life with the right tools for you

***Audience:*** *All (saying all because in NE those in this class were all the accounting person doing licensing* ***Format:*** *Panel*

***Presenters:*** *Joyce Sigler-Jones-Wenner, Chris Gillespie-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** AMS423 **Room:** 205A-C

**Session Title:** Schedules & Proposals, Part 2

**Description**: Three-part presentation that covers all aspects of AMS360's DocDesigner system used to create and edit Schedules & Proposals, Part 2

***Audience:*** *Admin, Account Manager* ***Format:*** *Presenter*

***Presenters:*** *Angela Painter-Angela Adams Consulting*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** AMS422 **Room:** 207A-D

**Session Title:** VSSO-Enabled - Client Portal Set-up and Implementation

**Description**: Are you reaching your clients, do not miss this important feature available and how to set it up in your agency.

***Audience:*** *Admin; Account Manager* ***Format:*** *Side by Side*

***Presenters:*** *Kerri Urrutia-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** AMS421 **Room:** 209A-C

**Session Title:** Connectivity - eDocs

**Description**: Search no longer with Edoc carrier correspondence to you.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Joyce Sigler-Jones-Wenner, , Laurie Gillam-Gardiner Allen DeRoberts Insurance, Nellie Massoni-Vertafore, Kristin Hicks-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** AMS433 **Room:** 205A-C

**Session Title:** Schedules & Proposals, Part 3

**Description**: Three-part presentation that covers all aspects of AMS360's DocDesigner system used to create and edit Schedules & Proposals, Part 3

***Audience:*** *Admin, Account Manager* ***Format:*** *Presenter*

***Presenters:*** *Angela Painter-Angela Adams Consulting*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** AMS432 **Room:** 207A-D

**Session Title:** VSSO-Enabled - Client Portal From the Client Perspective

**Description**: See what you customers see … from the use of Client portal. How you can make a difference in your customers life

***Audience:*** *Admin; Account Manager* ***Format:*** *Side by Side*

***Presenters:*** *Kerri Urrutia-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** AMS431 **Room:** 209A-C

**Session Title:** Connectivity - Claims Download

**Description**: Taking full advantage of the data that carriers are sending directly to your agency and into your customer records

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Joyce Sigler-Jones-Wenner, , Laurie Gillam-Gardiner Allen DeRoberts Insurance, Nellie Massoni-Vertafore, Kristin Hicks-Vertafore*

# Sagitta

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** SAG214 **Room:** 101AB

**Session Title:** Report Builder & Dictionaries - Intermediate

**Description**: Explore what dictionary items may be needed to obtain data and how to create them. You will also learn how to incorporate these items into report builder statements to produce reports that provide the information you need.Highlights & Demos: General usage rules - what's required; dictionaries - both dictionary and data parts and types of dictionaries including SQL dictionaries; sample report builder statements.

***Audience:*** *Admin & Other* ***Format:*** *Presenter*

***Presenters:*** *Bill Henson-Vertafore, Michelle Hoffert- Lanier-Upshaw*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** SAG211 **Room:** 101C-E

**Session Title:** New Business Submission Workflow - Commercial Lines

**Description**: Tracing the workflow of transacting/processing new business submissions through binding. Learn tips & tricks and best practices to make your process more efficient using a combination of applications such as Sagitta, ImageRight, Outlook, VertaforeForms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download. Learn how the business is handled differently when it is downloaded from the carrier or when the business is through an intermediary/wholesaler or it is a BOR.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Kelly Bolton-Dowling & O'Neil, Rebecca Jacobs-CBIZ, Kim Gilbert-Bouchard Ins*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** SAG212 **Room:** 102A

**Session Title:** New Business Submission Workflow - Personal Lines

**Description**: Tracing the workflow of transacting/processing new business submissions through binding. Learn tips & tricks and best practices to make your process more efficient using a combination of applications such as Sagitta, ImageRight, Outlook, VertaforeForms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download. Learn how the business is handled differently when it is downloaded from the carrier or when the business is through an intermediary/wholesaler or it is a BOR.

***Audience:*** *Account Manager-PL* ***Format:*** *Presenter*

***Presenters:*** *Cindy Levron-USI, Lindsay Burkeen-Peel & Holland, Karen Reyes-Bouchard Ins*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** SAG213 **Room:** 103A-C

**Session Title:** Personalization

**Description**: Discuss accounting flag maintenance, role based security, import/export, insurer, payee, vendor, AM Best import and states taxes/fees personalization.

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Liz Canale-Crystal & Co, Maureen Ervin-MMA*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** SAG224 **Room:** 101AB

**Session Title:** Report Builder & Dictionaries - Advanced

**Description**: Learn how to adjust your Dictionary Items to create the best reports possible. Once these items are created, learn how to insert them into custom reports and distribute them to others in your organization. Highlights & Demos:Adjusting dictionary field characteristics for optimal report output; creating/saving custom reports; distributing reports in Sagitta; correlatives.

***Audience:*** *Admin & Other* ***Format:*** *Presenter*

***Presenters:*** *Bill Henson-Vertafore, Michelle Hoffert- Lanier-Upshaw*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** SAG222 **Room:** 101C-E

**Session Title:** Renewal Submission Workflow - Commercial Lines

**Description**: Tracing the workflow of transacting/processing renewal or rewriting business submissions through binding. Learn tips & tricks and best practices to make your process more efficient using a combination of applications such as Sagitta, ImageRight,Outlook, Vertafore Forms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download. Learn how the business is handled differently when it is downloaded from the carrier or through an intermediary/wholesaler or it is a BOR.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Kelly Bolton-Dowling & O'Neil, Kim Gilbert-Bouchard Ins*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** SAG221 **Room:** 102A

**Session Title:** Renewal and Rewrite Submission Workflow - Personal Lines

**Description**: Tracing the workflow of transacting/processing renewal or rewriting business submissions through binding. Learn tips & tricks and best practices to make your process more efficient using a combination of applications such as Sagitta, ImageRight,Outlook, Vertafore Forms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download. Learn how the business is handled differently when it is downloaded from the carrier or through an intermediary/wholesaler or it is a BOR.

***Audience:*** *Account Manager-PL* ***Format:*** *Presenter*

***Presenters:*** *Cindy Levron-USI, Lindsay Burkeen-Peel & Holland, Karen Reyes-Bouchard Ins*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** SAG223 **Room:** 103A-C

**Session Title:** Receivables/Collections Processing

**Description**: Receivables/Collections Processing

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Kimberly Buck-Haylor Freyer & Coon, Amy Erickson-Regions*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** SAG234 **Room:** 101AB

**Session Title:** Web Services

**Description**: Find out how other agencies are using WebServices in their organizations. Bring examples of your processes to share with other attendees.

***Audience:*** *Administrator* ***Format:*** *Presenter*

***Presenters:*** *Bill Henson-Vertafore, Teri McGuire-Crystal & Co*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** SAG233 **Room:** 101C-E

**Session Title:** Endorsement Workflow - Commercial Lines

**Description**: Tracing the workflow of transacting/processing renewal or rewriting business submissions through binding. Learn tips & tricks and best practices to make your process more efficient using a combination of applications such as Sagitta, ImageRight,Outlook, Vertafore Forms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download. Learn how the business is handled differently when it is downloaded from the carrier or through an intermediary/wholesaler or it is a BOR.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Rebecca Jacobs-CBIZ, Brent Blanks-J Smith Lanier*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** SAG231 **Room:** 102A

**Session Title:** Endorsement, Cancellation, Reinstatement and Non-Renewal Workflow - Personal Lines

**Description**: Tracing the workflow of transacting/processing renewal or rewriting business submissions through binding. Learn tips & tricks and best practices to make your process more efficient using a combination of applications such as Sagitta, ImageRight,Outlook, Vertafore Forms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download. Learn how the business is handled differently when it is downloaded from the carrier or through an intermediary/wholesaler or it is a BOR.

***Audience:*** *Account Manager-PL* ***Format:*** *Presenter*

***Presenters:*** *Karen Reyes-Bouchard Ins, Nancy Correnty-Sullivan Curtis Monroe Ins*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** SAG232 **Room:** 103A-C

**Session Title:** Direct Bill Processing

**Description**: Direct Bill Processing

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Lee Hawken-Bouchard Ins, Amy Erickson-Regions*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** SAG243 **Room:** 101AB

**Session Title:** Sagitta Personalization

**Description**: Learn about the personalization for ASD, Vertafore eForms, Grid Display, Policy Flags, Certificates/EPIs and Import/Export. This session does not include Accounting Personalization

***Audience:*** *Administrator* ***Format:*** *Presenter*

***Presenters:*** *Allyne Miller-Allen Lawrence, Phil Reimer-Rockwood Company, Gretchen Hodge-USI*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** SAG244 **Room:** 101C-E

**Session Title:** Cancellation, Reinstatement, Non-Renewal and Rewrite Workflow - Commercial Lines

**Description**: Tracing the workflow of transacting/processing renewal or rewriting business submissions through binding. Learn tips & tricks and best practices to make your process more efficient using a combination of applications such as Sagitta, ImageRight,Outlook, Vertafore Forms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download. Learn how the business is handled differently when it is downloaded from the carrier or through an intermediary/wholesaler or it is a BOR.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Kelly Bolton-Dowling & O'Neil, Kim Gilbert-Bouchard Ins*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** SAG241 **Room:** 102A

**Session Title:** Using WorkSmart in Personal Lines

**Description**: Open Forum to discuss using WorkSmart in Personal Lines - bring your questions, learn how your peers are using WorkSmart for their personal lines business.

***Audience:*** *Account Manager-PL* ***Format:*** *Panel*

***Presenters:*** *Lindsay Burkeen-Peel & Holland, Cindy Levron-USI*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** SAG242 **Room:** 103A-C

**Session Title:** Vendor Payables Processing

**Description**: Vendor Payables Processing

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Kimberly Buck-Haylor Freyer & Coon, Amy Erickson-Regions, Wendy Larson-Fred Moreton & Sons*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** SAG253 **Room:** 101AB

**Session Title:** In-House vs Online and In-House Maintenance

**Description**: What do you need to consider when deciding whether to be Sagitta In-House or Online? Join this discussion to learn about the pros and cons. If In-House, what does the Maintenance Schedulelook like to make sure Sagitta is running as optimally as possible (i.e., Archive/Purge, File Resizing, etc.). Highlights & Demos: Maintenance schedule differences (In-House vs. Online); Archive/Purge; File resizing.

***Audience:*** *Admin & Other* ***Format:*** *Presenter*

***Presenters:*** *Allyne Miller-Allen Lawrence, Jesse Sanchez-USI, Kim Meyers-USI, Bill Henson-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** SAG254 **Room:** 101C-E

**Session Title:** Audit or Interim Reporting Workflow - Commercial Lines

**Description**: Tracing the workflow of transacting/processing an interim report or an audit. Learn tips & tricks and best practices to make your process more efficient using a combination ofapplications such as Sagitta, ImageRight, Outlook, Vertafore Forms, AMSWord, TransactNow, Carrier Websites, ReferenceConnect and carrier download.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Brent Blanks-J Smith Lanier, Cindy Enick-USI*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** SAG251 **Room:** 102A

**Session Title:** Personal Lines Roundtables/Open Forum

**Description**: Join your fellow attendees to discuss various subjects such as VIP/Executive Clients, Carrier download issues, Evidences of Property workflow.

***Audience:*** *Account Manager-PL* ***Format:*** *Round Table*

***Presenters:*** *Patti Robinson-AIA*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** SAG252 **Room:** 103A-C

**Session Title:** Producers PANEL

**Description**: Reporting and various payment methods

***Audience:*** *Accounting & Admin* ***Format:*** *Panel*

***Presenters:*** *Kimberly Buck-Haylor Freyer & Coon, Amy Erickson-Regions, Ed Navalany-Szerlip & Co*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** SAG263 **Room:** 101AB

**Session Title:** Carrier Download and TransactNow

**Description**: Learn how to personalize the Company Mailbox in Sagitta in preparation for Carrier Download, including carrier specific configurations (NAIC codes, LOBs, etc.). Identify what the Mailbox Output Codes mean and when you need to take action.Also covering the personalization for TransactNow. Highlights & Demos: Certification Sheets.

***Audience:*** *Administrator* ***Format:*** *Presenter*

***Presenters:*** *Phil Reimer-Rockwood Company, Shannan Broughan-Propel Ins*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** SAG264 **Room:** 101C-E

**Session Title:** Certificates and Evidence of Property Workflow - Personal & Commercial

**Description**: Tracing the workflow when you receive a request for a certificate or evidence of property or when it is time to renew your policies and certificate templates. Learn tips & tricks and best practicesto make your process more efficient using a combination of applications such as Sagitta, ImageRight, Outlook and Import/Export Schedules. Discuss Best practices as to when you should archive holders and templates.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Rebecca Jacobs-CBIZ, Carol Dunbar-J Smith Lanier, Dawn Mathews-IMA*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** SAG261 **Room:** 102A

**Session Title:** Personal Lines Wrap Up/Open Forum

**Description**: Join your fellow attendees to talk about everything you've learned today and ask any other questions of your fellow users.

***Audience:*** *Account Manager-PL* ***Format:*** *Round Table*

***Presenters:*** *Patti Robinson-AIA*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** SAG262 **Room:** 103A-C

**Session Title:** Auditing

**Description**: Auditing

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Liz Canale-Crystal & Co, Maureen Ervin-MMA*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** SAG313 **Room:** 101AB

**Session Title:** In-House Disaster Recovery

**Description**: What do you need in your Disaster Recovery Plan to keep Sagitta up and/or recover from an outage? Join this session to learn some best practices.

***Audience:*** *Administrator* ***Format:*** *Presenter*

***Presenters:*** *Ryan Deeds-The Crichton Group, Bill Henson-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** SAG314 **Room:** 101C-E

**Session Title:** Vertafore eForms - Personal and Commercial Lines

**Description**: Learn what's new and coming soon. Take a look at the personalization of the forms and how intuitive it is to customize the forms for your agency. Learn tips & tricks and how to use the new Mapping Guide to help with training.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Carol Dunbar-J Smith Lanier, Linda Findlay-Bailey-Haskell*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** SAG311 **Room:** 102A

**Session Title:** Managing Books of Business and Workload using Sagitta and WorkSmart- Personal and Commercial Lines

**Description**: How are you managing your books of business/account distribution in Sagitta and ImageRight? Come to listen and discuss with your peers how they are managing the distribution of accounts among their staff based on workload analysisusing Sagitta and ImageRight reports.

***Audience:*** *Account Manager-PL* ***Format:*** *Panel*

***Presenters:*** *Brandon Fowler-USI, Gretchen Hodge-USI, Kate O'Toole-Seubert & Assoc*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** SAG312 **Room:** 103A-C

**Session Title:** Interdivisional Accounting

**Description**: Interdivisional Accounting

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Bruce Westman-Vertafore, Amy Erickson-Regions*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** SAG322 **Room:** 101AB

**Session Title:** Sagitta / WorkSmart Integration - Basic

**Description**: This session will cover the basics of tackling your Sagitta/WorkSmart integration. Learn about the requirements needed to personalize Sagitta and IR/WS for new divisions, departments and coverage codes as well as creating tasks andtroubleshooting sync issues.

***Audience:*** *Administrator* ***Format:*** *Presenter*

***Presenters:*** *Michelle Hoffert-Lanier-Upshaw, Brad Booth-Sullivan-Curtis, Kate O'Toole, Seubert & Assoc*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** SAG323 **Room:** 101C-E

**Session Title:** Advanced Invoicing - Personal and Commercial Lines

**Description**: Learn how to generate invoices for business that is more complex than a standard invoice such as BORs, Multi Bill Tos, Multi Producers, Multi Transactions, Surplus Lines Taxes and Installments.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Christine Perreault-Baldwin Krystyn Sherman, Tracey Weber-Huntington Ins, Dawn Mathews-IMA*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** SAG321 **Room:** 103A-C

**Session Title:** Sagitta Reporting/3rd Party Alternatives \*PANEL

**Description**: Sagitta Reporting/3rd Party Alternatives \*PANEL

***Audience:*** *Accounting & Admin* ***Format:*** *Panel*

***Presenters:*** *Teri McGuire-Crystal & Co, Amy Erickson-Regions*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** SAG332 **Room:** 101AB

**Session Title:** Sagitta and WorkSmart Integration - Advanced

**Description**: A session covering a detailed look at Audits & Premium Comparisons and Automated Renewal Task Imports.

***Audience:*** *Administrator* ***Format:*** *Presenter*

***Presenters:*** *Michelle Hoffert-Lanier-Upshaw, Brad Booth-Sullivan-Curtis, Kate O'Toole, Seubert & Assoc*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** SAG333 **Room:** 101C-E

**Session Title:** Tips & Tricks - Vertafore Specific Products

**Description**: Join us to learn some great tips and tricks on the utilization of Sagitta and ImageRight. Some things you may have heard about in past years, but forgot about, or may have not realized are available.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Tracey Weber-Huntington Ins, Tammy Kram-USI*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** SAG331 **Room:** 103A-C

**Session Title:** New Revenue Recognition Standards

**Description**: New Revenue Recognition Standards

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Bruce Westman-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** SAG413 **Room:** 101AB

**Session Title:** Sagitta and Benefit Point Integration

**Description**: Learn how to personalize the Sagitta/BenefitPoint Integration and troubleshoot any sync issues. Get a glimpse of how to use WorkSmart on Benefits Accounts with the Sagitta/BenefitPoint integration.

***Audience:*** *Admin & Account Managers* ***Format:*** *Presenter*

***Presenters:*** *Crisanna Lin-Higginbotham*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** SAG411 **Room:** 101C-E

**Session Title:** Tips & Tricks - Various Applications

**Description**: Come learn some tips and tricks and share some of your own on a mix of various applications that we encounter on a daily basis, from Outlook Personalization to Adobe Editing to the iOS10 update for iPhone.Highlights & Demos: Adobe - editing and forms; Microsoft Products - Excel and Outlook; iOS10 Update.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Kate O'Toole-Seubert & Assoc, Sherri Monteith-PSF*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** SAG414 **Room:** 102A

**Session Title:** What's New REPEAT

**Description**: Come hear the Sagitta road map covering what is new and what is coming.

***Audience:*** *PL & Other* ***Format:*** *Presenter*

***Presenters:*** *Bruce Westman-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** SAG412 **Room:** 103A-C

**Session Title:** Financial Management

**Description**: Financial Management

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Amy Erickson-Regions*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** SAG423 **Room:** 101AB

**Session Title:** Reference Connect

**Description**: Learn about new features coming in ReferenceConnect. Connect with your peers to learn tips & tricks to help you get the most out of the resources that are right at your fingertips.

***Audience:*** *Admin & Other* ***Format:*** *Presenter*

***Presenters:*** *Shannan Broughan- Propel Ins, Monica McCool-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** SAG421 **Room:** 101C-E

**Session Title:** Vertafore eForms - Personal and Commercial Lines REPEAT

**Description**: Learn what's new and coming soon. Take a look at the personalization of the forms and how intuitive it is to customize the forms for your agency. Learn tips & tricks and how to use the new Mapping Guide to help with training.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Carol Dunbar-J Smith Lanier, Linda Findlay-Bailey-Haskell*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** SAG422 **Room:** 103A-C

**Session Title:** Accounting Workflows Using Sagitta and WorkSmart

**Description**: Accounting Workflows using Sagitta and WorkSmart

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Amy Erickson-Regions*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** SAG433 **Room:** 101AB

**Session Title:** Admin Wrap Up

**Description**: Join the conversation on several roundtable discussions, including: Conversions - what to do, what to expect, pain points and lessons learned; New to Sagitta - bring your questions and learn from your peers, find valuable resourcesand education tools available at your fingertips; Archive/Purge - what's the process; how often should it be done.

***Audience:*** *Administrator* ***Format:*** *Presenter*

***Presenters:*** *Carol Luebbehusen-Higginbotham, Kim Meyers-USI, Gretchen Hodge-USI*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** SAG431 **Room:** 101C-E

**Session Title:** Personal and Commercial Lines Wrap Up

**Description**: Join your fellow attendees to talk about everything you've learned over the past 2 days and ask any other questions of your fellow users. Great time to wind down from all of the great education that you've been exposed to over the past few days.

***Audience:*** *Account Manager-CL* ***Format:*** *Presenter*

***Presenters:*** *Linda Findlay-Bailey-Haskell, Kate O'Toole-Seubert & Assoc, Patti Robinson-AIA*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** SAG432 **Room:** 103A-C

**Session Title:** Accounting Wrap Up

**Description**: Join your fellow attendees to talk about everything you've learned over the past 2 days and ask any other questions of your fellow users. Great time to wind down from all of the great education that you've been exposed to over the past few days.

***Audience:*** *Accounting & Admin* ***Format:*** *Presenter*

***Presenters:*** *Bruce Westman-Vertafore, Amy Erickson-Regions*

**Date/Time:** Sunday, Mar 5, 2017, 10:15 AM - 11:15 AM

**Session ID:** SAG424 **Room:** 102A

**Session Title:** Introduction to licensing compliance with Sagitta and Sircon

**Description**: Learn how you can improve licensing and compliance turnaround / accuracy with Sircon and Sagitta integration.

***Audience:*** *PL & Other* ***Format:*** *Presenter*

***Presenters:*** *Scott Gillahan-Vertafore, Patrick Masi-Vertafore, Ellen Dale-Lipscomb & Pitts*

# QQCatalyst

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** QQC211 **Room:** 203AB

**Session Title:** Analytics / Reporting

**Description**: In this session we will discuss the power of analytics and how accurate information can help shape informed business decisions that drive agency growth. There are several standard reports in QQCatalyst thatprovide key insight on the standing of the agency.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** QQC221 **Room:** 203AB

**Session Title:** Service Automation

**Description**: Alleviate yourself and your staff from having to remember when emails should be sent to your customer and when tasks need to be created. Service automation allows you to define what communications and tasks should becreated whenever a pre-defined trigger takes place in the management system. This session will focus on allowing the new Agency Intelligence feature to serve as the employee working 365 days a year 24 hours a day.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** QQC231 **Room:** 203AB

**Session Title:** 2017 Roadmap and Future Enhancements Discussion

**Description**: Gain insight on the features and enhancements scheduled for the remainder of the year and weigh in on the items we look to address in the upcoming year

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** QQC241 **Room:** 203AB

**Session Title:** Connectivity: Downloads, Integrated Rating, Texting

**Description**: Advances in technology has made it easier for systems to communicate. Carriers are sending updates to customer and policy information as they happen. Raters are able to bridge information to a management system andreceive information from the management system. Now the management system is able to communicate to your customers on the device they have with them all the time; their smartphones through texting.As agents of the digital revolution, this session will discuss the importance of adopting technology to be prepared as the future becomes today.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** QQC251 **Room:** 203AB

**Session Title:** The True Value of Retention

**Description**: Agencies are working diligently to build their book of business through new business sales and cross selling to their existing customers. There is a direct correlation between the desired growth of the agency,the amount of new business sales necessary to achieve that growth, and the amount of existing business the agency is able to retain. In this session, we will break down the true value of retention by the numbers.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** QQC261 **Room:** 203AB

**Session Title:** Unexpected Delight

**Description**: The competition for your customer is higher than it has ever been. With mailers, radio ads, and television commercials all soliciting their business, what will keep your customer from leaving your agency?In this session, we will discuss the power of delighting your customers by exceeding their expectations.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** QQC311 **Room:** 203AB

**Session Title:** You’ve Got Mail

**Description**: The days of having to drag and drop Outlook emails one by one are over. Whether you’re communicating with your customer via email within the management system, or directly through your email client,learn how the Mailroom can file each communication automatically to protect the agency in the case of an E&O. The innovative cloud integration supports every major email provider (Gmail, Yahoo, Office365, Outlook, GoDaddy) and even custom providers.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** QQC321 **Room:** 203AB

**Session Title:** Feeding the Pipeline

**Description**: In this session we will discuss details of the upcoming sales pipeline integration. The sales pipeline will empower the agency to accurately forecast future sales based on current and past performance.Agency owners and producers will be able to see which stage every opportunity is in, past communications as well as next steps. The pipeline will equip the agency to grow their business by allowing agency administrators toset goals for each producer and by showing producers their performance against their goals.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** QQC331 **Room:** 203AB

**Session Title:** Agency Challenges Forum

**Description**: Our customer’s feedback has been the primary driving force behind our new features and enhancements. In this session, we would like to explore the biggest challenges facing your agency.We would like to hear from you how we can help you overcome those challenges and make the system work better for you.

***Audience:*** *All* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

# AIM/MGA

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** AIM211 **Room:** 108

**Session Title:** Configuring AIM for London Binding Contracts

**Description**: Learn and discuss how to setup and configure AIM for London binding contracts.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Tammie Miller-RPS*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** AIM213 **Room:** 109

**Session Title:** MGA Tech Support Open Mic

**Description**: This session is designed for anyone to raise any topic as it relates to tech support for MGA's. Business continuity, data retention, infrastructure upgrade planning; you name it, your peers will interact with you.

***Audience:*** *Reg Compl/DB Admin/App Support* ***Format:*** *Presenter*

***Presenters:*** *Ronny Nauert-Specialty Insurance Managers*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** AIM212 **Room:** 206AB

**Session Title:** Using Tax Managers

**Description**: This session will discuss the current state tax managers within AIM's Process Manager application and how each is configured.

***Audience:*** *Acctg/SLTax//DB Admin/App Support* ***Format:*** *Panel*

***Presenters:*** *Christi Menke-Specialty Insurance Managers, Karen Jessen-RT Specialty, Shannon Stoner-RT Specialty, Michelle DiMartile-Russell Bond, Michele Clubb-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** AIM221 **Room:** 108

**Session Title:** Document Sections & Repeatable Sections

**Description**: Learn how to use the document and repeatable section features in Document Designer.

***Audience:*** *Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Danny Journeay-Specialty Insurance Managers, Nancy Peacock-RT Specialty*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** AIM223 **Room:** 109

**Session Title:** The App Store concept

**Description**: Do you have a SQL query, custom table or custom stored procedure that you can make available to other AIM clients? Come and learn about Vertafore's concept of The App Store designed for AIM clients to share feature customizations with other AIM clients.

***Audience:*** *DB Admin/App Support* ***Format:*** *Presenter*

***Presenters:*** *Neil Snowdon-Vertafore, Marc Stevens-Western Security Surplus Insurance, Jeremy Fowler-RT Specialty, Reggie Farrington-RPS*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** AIM222 **Room:** 206AB

**Session Title:** London-AIM Best Practices

**Description**: Learn and discuss how to process submissions under London binding contracts.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Tammie Miller-RPS, Tracy Engel-Lucitech/Bolton & Co.*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** AIM231 **Room:** 108

**Session Title:** Renewal rules & defaults

**Description**: A demonstration on how to create and use Renewal Manager's renewal rules feature.

***Audience:*** *Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Presenter*

***Presenters:*** *Danny Journeay-Specialty Insurance Managers, Marc Beemer-RT Specialty*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** AIM232 **Room:** 109

**Session Title:** Crystal Reports Roundtable

**Description**: This roundtable discussion will cover how to use Crystal Reports to generate auto ID cards, consolidate individual invoices, create production reports, mailing labels, rating work sheet and much more.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Reggie Farrington-RPS, Tracy Engel-Lucitech/Bolton & Company*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** AIM233 **Room:** 206AB

**Session Title:** Creating Annotations, Stamping, and Document editing in ImageRight

**Description**: A session designed to spotlight the document editing features in ImageRight

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Presenter*

***Presenters:*** *Lillian Carney-RPS, Karla Naujokat-RPS*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** AIM241 **Room:** 109

**Session Title:** Division, Team, and State-Specific Templates, Including Tax Affidavits as Templates and PDF Forms

**Description**: Learn how to use Document Designer to create division, team and state specific templates, including tax affidavits, and creating PDF forms.

***Audience:*** *Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Brandy Lane-RPS, Marc Beemer-RT Specialty, Nancy Peacock-RT Specialty*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** AIM242 **Room:** 206AB

**Session Title:** AIM Accounting & Process Manager 2017r1 - New features and major improvements

**Description**: Learn and discuss the new features in AIM Accounting and Process Manager in the 2017r1 release.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support* ***Format:*** *Presenter*

***Presenters:*** *Michelle Clubb-Vertafore, Neville Allen-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** AIM252 **Room:** 109

**Session Title:** Premium Finance, ACH & Credit Cards-Providing Options to wholesale/MGA customers

**Description**: Are the days of writing checks finally over? Do your insureds struggle with cash flow and need to better manage it through premium financing? A 2013 study by the Federal Reserve showed that in 2003 checks accounted for 46% of payment transactions, butby 2012 checks only accounted for 15% of payment transactions. A Colonnade study estimated that nearly 15% of the $235 billion of U.S. commercial P&C insurance premiums were financed in 2013, generating approximately $30 billion of financingoriginations. Attend this roundtable to see how Vertafore and their partners are working to meet these trends head on.

***Audience:*** *Acctg/SLTax/DB Admin/App Support* ***Format:*** *Round Table*

***Presenters:*** *Eric Mathis-Vertafore, Neville Allen-Vertafore, William Trainer-WorldPay, Russ Gohl-BankDirect Capital Finance*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** AIM251 **Room:** 206AB

**Session Title:** Product Enhancement Roundtable

**Description**: A demonstration of the PERS (Product Enhancement Request System) for AIM and how you can submit an enhancement request. Meet the AIM PERS committee and join in the roundtable discussion onhow enhancement requests are reviewed, communicated to AIM users for voting, and prioritizing for development.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Round Table*

***Presenters:*** *Jeremy Fowler-RT, Neville Allen-Vertafore, Karla Naujokat, RPS, Carole Hardy-US Risk*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** AIM261 **Room:** 108

**Session Title:** AIM 2017r1 - New Features and major improvements

**Description**: Learn and discuss the new features in AIM and VPI in the 2017r1 release.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Presenter*

***Presenters:*** *Neville Allen-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** AIM262 **Room:** 206AB

**Session Title:** Tax Table & State Fee Controls

**Description**: This session will demonstrate the features of the tax table along with the state fee controls portion of the state table.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Dianne Shelton-RPS, Brandy Lane-RPS. Karen Jessen-RT Specialty, Shannon Stoner-RT Specialty, Paul Saccomando-Russell Bond*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** AIM311 **Room:** 109

**Session Title:** Database layout, Basic SQL Queries, and SQL Server Operations

**Description**: Come and learn AIM's SQL database schema and how to write basic queries. SQL server operations will also be discussed.

***Audience:*** *DB Admin/App Support* ***Format:*** *Panel*

***Presenters:*** *Jeremy Fowler-RT, Tracy Engel-Lucitech/Bolton & Company*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** AIM312 **Room:** 206AB

**Session Title:** London Reporting Roundtable

**Description**: If you have London contracts, you will want to attend this roundtable discussion. We will focus on best practices and standards of both underwriting and premium bordereaux's.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Presenter*

***Presenters:*** *Tammie Miller-RPS, Tracy Engel-Lucitech/Bolton & Co.*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** AIM322 **Room:** 108

**Session Title:** Creating & Maintaining VPI custom forms libraries

**Description**: Do you have a specific Lloyd's program where your firm is responsible create and maintain policy forms? Learn how VPI is used to house custom policy forms and feed underwriting data from AIM into the policy documents.

***Audience:*** *Reg Compl/DB Admin/App Support* ***Format:*** *Panel*

***Presenters:*** *Christi Menke-Specialty Insurance Managers, Johan Keet-US Risk*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** AIM321 **Room:** 109

**Session Title:** Document Sections & Repeatable Sections REPEAT

**Description**: Learn how to use the document and repeatable section features in Document Designer.

***Audience:*** *Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Danny Journeay-Specialty Insurance Managers, Nancy Peacock-RT Specialty*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** AIM323 **Room:** 206AB

**Session Title:** Document Integration with ImageRight

**Description**: A demonstration of AIM 2016r4 with ImageRight v6.x document integration enabled.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Presenter*

***Presenters:*** *Neville Allen-Vertafore, Karyn Fowler-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** AIM332 **Room:** 108

**Session Title:** Active Directory integration w/ AIM

**Description**: A discussion and demo of how AIM can be integrated with Active Directory for more define security.

***Audience:*** *Reg Compl/DB Admin/App Support* ***Format:*** *Presenter*

***Presenters:*** *Neville Allen-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** AIM331 **Room:** 109

**Session Title:** Division, Team, and State-Specific Templates, Including Tax Affidavits as Templates and PDF Forms REPEAT

**Description**: Learn how to use Document Designer to create division, team and state specific templates, including tax affidavits, and creating PDF forms.

***Audience:*** *Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Brandy Lane-RPS, Marc Beemer-RT Specialty, Nancy Peacock-RT Specialty*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** AIM333 **Room:** 206AB

**Session Title:** The App Store concept REPEAT

**Description**: Do you have a SQL query, custom table or custom stored procedure that you can make available to other AIM clients? Come and learn about Vertafore's concept of The App Store designed for AIM clients to share feature customizations with other AIM clients.

***Audience:*** *DB Admin/App Support* ***Format:*** *Presenter*

***Presenters:*** *Neil Snowdon-Vertafore, Marc Stevens-Western Security Surplus Insurance, Jeremy Fowler-RT Specialty, Reggie Farrington-RPS*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** AIM413 **Room:** 108

**Session Title:** Document Integration with ImageRight REPEAT

**Description**: A demonstration of AIM 2016r4 with ImageRight v6.x document integration enabled.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Presenter*

***Presenters:*** *Neville Allen-Vertafore, Karyn Fowler-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** AIM411 **Room:** 109

**Session Title:** Product Enhancement roundtable REPEAT

**Description**: A demonstration of the PERS (Product Enhancement Request System) for AIM and how you can submit an enhancement request. Meet the AIM PERS committee and join in the roundtable discussion onhow enhancement requests are reviewed, communicated to AIM users for voting, and prioritizing for development.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Round Table*

***Presenters:*** *Jeremy Fowler-RT, Neville Allen-Vertafore, Karla Naujokat, RPS, Carole Hardy-US Risk*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** AIM412 **Room:** 206AB

**Session Title:** Reporting, Dashboards, and Analytics

**Description**: A roundtable discussion and demonstration on ways to create reporting tools outside of AIM.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Round Table*

***Presenters:*** *Chris Sylvester-XS Brokers*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** AIM423 **Room:** 108

**Session Title:** AIM/FinancePro/VPI Roadmap

**Description**: Learn and discuss the 2017 and 2018 roadmap for all AIM applications, FinancePro, and VPI.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Presenter*

***Presenters:*** *Neville Allen-Vertafore, Eric Mathis-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** AIM421 **Room:** 109

**Session Title:** Configuring AIM for London Binding Contracts REPEAT

**Description**: Learn and discuss how to setup and configure AIM for London binding contracts.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Tammie Miller-RPS*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** AIM422 **Room:** 108

**Session Title:** Creating & Maintaining VPI custom forms libraries REPEAT

**Description**: Do you have a specific Lloyd's program where your firm is responsible create and maintain policy forms? Learn how VPI is used to house custom policy forms and feed underwriting data from AIM into the policy documents.

***Audience:*** *Reg Compl/DB Admin/App Support* ***Format:*** *Panel*

***Presenters:*** *Christi Menke-Specialty Insurance Managers, Johan Keet-US Risk*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** AIM421 **Room:** 109

**Session Title:** London-AIM Best Practices REPEAT

**Description**: Learn and discuss how to setup and configure AIM for London binding contracts.

***Audience:*** *Acctg/SLTax/Reg Compl/DB Admin/App Support/Prod Team* ***Format:*** *Panel*

***Presenters:*** *Tammie Miller-RPS, Tracy Engel-Lucitech/Bolton & Co.*

# BenefitPoint

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** BEN211 **Room:** 104AB

**Session Title:** Benchmarking: Using our data, aggregate data and integrating third party data for a complete picture.

**Description**: Have you used the benchmarking tool in BP yet? If not, find out what you have been missing. If you have been using the tool, hear about the different ways Agencies are using their BenefitPoint to expand thebenchmarking data set or how to streamline the retrieval process.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Vanessa Kinney-Hylant, Mindy Day-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** BEN212 **Room:** 104CD

**Session Title:** Workflows: How they work, why should we use them and will they really help me manage my day?

**Description**: During this course administrators will learn the "ins" and "outs" of building workflows and what they may do for your agency. Service team members will learn how workflows can help manage your daily service and keep things running smoothly.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Chris Walters-USI, Kristie Barnes-Wortham Insurance & Risk Management*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** BEN221 **Room:** 104AB

**Session Title:** Reporting for Service: They do exist!

**Description**: What? There are reports available that might be useful to service team members. The answer is, Yes! Come to this session to learn about those reports and how to make them easily accessible to your team members.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Chris Walters-USI, Mindy Day-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** BEN222 **Room:** 104CD

**Session Title:** Managing Plans: There must be an easier way

**Description**: Learn for the first time or be reminded of all of the short-cuts, tip, tricks, best practices (how many of these can we fit into one sentence) available for creating efficiencies while managing plans in BenefitPoint

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Tony Fronza-Conner Strong & Buckelew, Sara Fish-CHS Insurance*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** BEN231 **Room:** 104AB

**Session Title:** Reporting for Auditing: Do You Know What You Are Missing?

**Description**: BenefitPoint contains a wide variety of information that holds importance at various levels. In this interactive session, you will hear about reports we like to run for auditing purposes, in an effort toidentify missing information, mitigate E&O exposures and to ensure we are providing the service our Clients expect. Additionally you will have the opportunity to ask about the best reports for use on information you are trying to audit.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Victoria Jackson-MMA, Crisanna Lin-Higginbotham & Associates*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** BEN232 **Room:** 104CD

**Session Title:** Stewardship: What have you done for me lately?

**Description**: With the words of the immortal Janet Jackson ringing in our ears, discover how BenefitPoint helps you tell clients the story of what you have done and what you will do on their behalf.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Tony Fronza-Conner Strong & Buckelew, Chris Walters-USI*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** BEN241 **Room:** 104AB

**Session Title:** Reporting for Prospecting: Who are you trying to impress, BenefitPoint can help?

**Description**: Benchmarking, reports for Broker RFP's and other information in BenefitPoint you can leverage in obtaining your next Client. Come to this session to hear ideas about real-life examples of how BenefitPoint helped win the business.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Vanessa Kinney-Hylant, Mindy Day-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** BEN242 **Room:** 104CD

**Session Title:** Integration: We have multiple systems, how do they talk with each other?

**Description**: Attend this panel session to discuss the inner workings of integrating multiple systems. Hear from those who have already gone through the process and their lessons learned. Discover ways to streamline information to make integration run smoothly.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Pete Czepiel-People's United Insurance Agency, Angela Minutaglio-,MMA, Sara Fish-CHS Insurance*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** BEN251 **Room:** 104AB

**Session Title:** Broker Admin 101 - Managing and Customizing BenefitPoint Components

**Description**: Are you new to the system and trying to figure things out? If you have said, how do I lock down access?, I wish the system would record this information?, or I wish there was an easier way toupdate books of business? Then this session is for you! Discover ways to make the system work for you in this Broker Admin 101 class.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Pete Czepiel-People's United Insurance Agency, Angela Minutaglio-,MMA*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** BEN252 **Room:** 104CD

**Session Title:** Webservices & BCE: I can do What with my data?

**Description**: What are these tools? How do I gain access? Who is using them and for what? Well, we have your questions answered with this session.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Michelle Lewis-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** BEN261 **Room:** 104AB

**Session Title:** End of the Day Q&A

**Description**: During our end of the day Q&A you will have an opportunity to ask questions about the day's sessions you may not have had answered or about a session you were not able to attend!Hear some tips and tricks around implementation or adoption of the concepts talked about during the day or just network a little with some other NetVU attendees.

***Audience:*** *Various* ***Format:*** *Round Table*

***Presenters:*** *Vanessa Kinney-Hylant, Gary Bossert-MMIC AgencyMichelle Lewis-Vertafore, Mindy Day-Vertafore, Laura Morales-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** BEN311 **Room:** 104AB

**Session Title:** RTM: The Basics

**Description**: Whether you are just getting started or have not yet decided whether BenefitPoint Revenue Tracking Module is right for you. Come to this session to learn about the pros, cons and ease of use of the RTM module.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Hope Wood-Tompkins Insurance, Michelle Lewis-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** BEN312 **Room:** 104CD

**Session Title:** RFP Module-Requests

**Description**: In this session you will learn about the RFP request tool and how it can create efficiencies in your marketing process and data integrity.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Vanessa Kinney-Hylant, Laura Morales-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** BEN321 **Room:** 104AB

**Session Title:** RTM: Advanced

**Description**: You are using the Revenue Tracking Module but now you are ready for more than just the basics. Come to this session, to learn more about how RTM can be used, how to address integration errors and much more!

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Hope Wood-Tompkins Insurance, Michelle Lewis-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** BEN322 **Room:** 104CD

**Session Title:** RFP Module-Questionnaire

**Description**: In this session, discover how to create a custom questionnaire within the RFP module and rate the individual carriers/administrators based on their responses. Gone are the days of the manual comparison.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Laura Morales-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** BEN331 **Room:** 104AB

**Session Title:** End of the Day Q&A

**Description**: During our end of the day Q&A you will have an opportunity to ask questions about the day's sessions you may not have had answered or about a session you were not able to attend!Hear some tips and tricks around implementation or adoption of the concepts talked about during the day or just network a little with some other NetVU attendees.

***Audience:*** *Various* ***Format:*** *Round Table*

***Presenters:*** *Vanessa Kinney-Hylant, Gary Bossert-MMIC AgencyMichelle Lewis-Vertafore, Mindy Day-Vertafore, Laura Morales-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** BEN411 **Room:** 104AB

**Session Title:** Identifying Missing Revenue: Show me the money!

**Description**: Are you using RTM or considering using RTM? What if we told you there are agencies using RTM reporting (as well as BI) to find missing revenue? Learn about the different reports available to help accounting and your teams manage revenue.Hear actual stories about agencies who used BenefitPoint to find missing revenue and put a process in place to keep revenue coming in as it should.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Victoria Jackson-MMA, Angela Minutaglio-MMA*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** BEN421 **Room:** 104AB

**Session Title:** Excel Tips & Tricks

**Description**: Back by popular demand! Regardless of which Vertafore products you have, come to this session to learns tips and tricks with Excel to manipulate your data and make it yours.

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Gary Bossert-MMIC Agency, Craig McDonald-AJ Gallagher*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** BEN431 **Room:** 104AB

**Session Title:** Conference Last Dance: Q&A

**Description**: Make sure you do not leave with anything unanswered. During this Q&A you will have an opportunity to ask questions about any sessions you may not have had answered or about a sessionyou were not able to attend! Provide feedback on conference, propose content for next year and learn how to access all of the information you received during conference plus MORE!

***Audience:*** *Various* ***Format:*** *Presenter*

***Presenters:*** *Vanessa Kinney-Hylant, Gary Bossert-MMIC AgencyMichelle Lewis-Vertafore, Mindy Day-Vertafore, Laura Morales-Vertafore*

# ImageRight/WorkSmart

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** IRW211 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - What's New and What's Coming

**Description**: Come hear about what the latest IR/WS release has in store for your organization and what’s coming in the future. Get all the information you need to help your organization plan ahead to take advantage of new and exciting solutions!

***Audience:*** *All Audiences* ***Format:*** *Presenter*

***Presenters:*** *Vijay Muniswamy-Vertafore, Karyn Fowler-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** IRW222 **Room:** 201AB

**Session Title:** WorkSmart and Vertafore Agency Platform

**Description**: We'll dive into the integration of WorkSmart with AMS360 in Vertafore Agency Platform. If you're curious about the functionality, or have Platform but haven't turned on the WorkSmart integration, this session is for you!

***Audience:*** *Agency End User, Agency Admin - Basic, Intermediate* ***Format:*** *Presenter*

***Presenters:*** *Kevin Pham-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** IRW221 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - Profiles & Policies in EMC

**Description**: Administering functions in IR can be difficult, especially if you don't take advantage of profiles and policies in EMC. In this session, we'll explain how to build policies and apply profiles that canquickly adjust what buttons, standard descriptions, and more your users can access.

***Audience:*** *Carrier, MGA and Agency Admin - Advanced* ***Format:*** *Presenter*

***Presenters:*** *Chris Hartman-Vertafore, Vijay Muniswamy-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** IRW231 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - Forms

**Description**: NOTE NEW TIME: The IR/WS team is enhancing the reporting solutions to provide data visualization via process dashboards and analytics. You won't want to miss seeing this exciting new tool!

***Audience:*** *Carrier, MGA, and Agency ADMIN - Advanced* ***Format:*** *Presenter*

***Presenters:*** *Michelle Hoffert-Lanier Upshaw, Chris Hartman-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** IRW241 **Room:** 201AB

**Session Title:** ImageRight - Enterprise Technology and Scalability

**Description**: Come learn about the technology available to you to integrate ImageRight with your other systems and how ImageRight can scale to meet the demands of your organization

***Audience:*** *Carrier, MGA and Agency Admin - Advanced* ***Format:*** *Presenter*

***Presenters:*** *Karyn Fowler-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** IRW242 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - Show & Tell of Efficiency Solutions

**Description**: In this panel discussion, we will explore how firms use forms, email receivers, file structures, and more to take full advantage of all IR/WS offers.

***Audience:*** *Carrier, MGA and Agency End User - Basic, Intermediate* ***Format:*** *Panel*

***Presenters:*** *Jessica Jeffress-Peel & Holland, Deanna Emison-Stephens Insurance, Patty McQuade-Moody Insurance, Deb Ward-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** IRW251 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - Process Dashboards and Process Analytics

**Description**: ImageRight/WorkSmart team is working on enhancements to provide data visualization via process dashboards and analytics. You won't want to miss seeing this exciting new tool!

***Audience:*** *Carrier, MGA and Agency Managers - All* ***Format:*** *Presenter*

***Presenters:*** *Michael Williams-Verafore, Vijay Muniswamy-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** IRW262 **Room:** 201AB

**Session Title:** ImageRight and WorkSmart - Browser Client

**Description**: Come and learn the details of how the IR/WS Browser Client works, the capabilities it has, and what's coming in the future.

***Audience:*** *Carrier, MGA and Agency - Basic* ***Format:*** *Presenter*

***Presenters:*** *Vijay Muniswamy-Vertafore, Deb Ward-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** IRW261 **Room:** 202A-C

**Session Title:** WorkSmart - Imports

**Description**: Is your agency taking advantage of renewal task imports? Are you utilizing other automated import processes for efficiency? If not, this session is for you! Learn how agencies use NUP / FUP process, import customizations and more.

***Audience:*** *Agency ADMIN - Intermediate, Advanced* ***Format:*** *Presenter*

***Presenters:*** *Michael Williams-Verafore, Chris Hartman-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** IRW311 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - Tips & Tricks

**Description**: NOTE NEW TIME: Shortcuts can increase efficiency and save your users a ton of time - that's why we're presenting this session on day-to-day function and efficiency tips and tricks for the Account Manager and CSR.

***Audience:*** *Carrier, MGA and Agency End User - Basic, Intermediate, Advanced* ***Format:*** *Presenter*

***Presenters:*** *Deanna Emison-Stephens Insurance, Jessica Jeffress-Peel & Holland*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** IRW322 **Room:** 201AB

**Session Title:** WorkSmart - Implementing for Accounting

**Description**: You've implemented the system for your main operations - but what about for accounting? IR/WS is a great place to manage receivables, payables, contracts, and more.

***Audience:*** *Agency Admin and End User - Basic, Intermediate, Advanced* ***Format:*** *Presenter*

***Presenters:*** *Patty McQuade-Moody Insurance, Janet Schoenfeld-Landscape Contractors Insurance*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** IRW321 **Room:** 202A-C

**Session Title:** ImageRight / WorkSmart - Future Enhancements Deep Dive

**Description**: Join us as we take a deeper dive into future enhancements, including OCR forms recognition, Content Access Auditing, and Redaction Recognition

***Audience:*** *Carrier, MGA and Agency End User - Basic, Intermediate, Advanced* ***Format:*** *Presenter*

***Presenters:*** *Michael Williams-Vertafore, Vijay Muniswamy-Vertafore, Karyn Fowler-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** IRW331 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - Tips & Tricks for Admin

**Description**: Join us as we review some tips and tricks to help make your job as admin of IR/WS easier.

***Audience:*** *Carrier, MGA and Agency ADMIN - Intermediate* ***Format:*** *Presenter*

***Presenters:*** *Michael Williams-Vertafore, Brittany Bulloch-Stephens Insurance*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** IRW412 **Room:** 201AB

**Session Title:** ImageRight and WorkSmart - Searching

**Description**: Learn the art of searching in ImageRight and ways it can help make finding a needle in a haystack much easier.

***Audience:*** *Carrier, MGA and Agency End User - Basic, Intermediate, Advanced* ***Format:*** *Presenter*

***Presenters:*** *Deanna Emison-Stephens Insurance, Deb Ward-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** IRW411 **Room:** 202A-C

**Session Title:** WorkSmart - Workflows Beginner

**Description**: Wonder how to tweak your existing workflows or create new ones? In this session, we'll introduce you to Workflow Studio and review workflow best practices.

***Audience:*** *Carrier, MGA and Agency ADMIN - Intermediate* ***Format:*** *Presenter*

***Presenters:*** *Chris Meadows-Vertafore, Nitish Venkatesh-Vertafore, Brad Booth-Sullivan Curtis Monroe*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** IRW421 **Room:** 202A-C

**Session Title:** WorkSmart - Workflows Advanced

**Description**: Already know how to tweak and create workflows? Join us as we answer your questions to help take your workflows to the next level. This session is tailored toward those admins with programming experience who are familiar with Workflow Studio.

***Audience:*** *Carrier, MGA and Agency Admin - Advanced* ***Format:*** *Presenter*

***Presenters:*** *Chris Meadows-Vertafore, Nitish Venkatesh-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** IRW431 **Room:** 202A-C

**Session Title:** ImageRight and WorkSmart - System Admin Best Practices

**Description**: So you're a system admin - do you know the best practices that make your system work the best for your organization? We'll cover everything from file structures to workflows to setting up user security.

***Audience:*** *Carrier, MGA and Agency ADMIN - Advanced* ***Format:*** *Presenter*

***Presenters:*** *Chris Meadows-Vertafore, Nitish Venkatesh-Vertafore*

# Tech

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** TEC211 **Room:** 105AB

**Session Title:** Mobile Workforce

**Description**: Technology has always been used to advance business. Today however, more and more companies, across a spectrum of industries, are implementing enterprise mobility strategies. And they aren’t justintegrating mobile into their current systems; they are using mobility to completely change how they do business and leveraging it to streamline their workflows and increase employee productivity.

***Audience:*** *IT; Admin; Help Desk* ***Format:*** *Presenter/Panel*

***Presenters:*** *Perry Myers-Peel & Holland, Ommie Rivera-Murray Securus, Kate O'Toole-Seubert*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** TEC221 **Room:** 105AB

**Session Title:** Data Analytics

**Description**: The analytics process, including the deployment and use of big data analytics tools, can help companies improve operational efficiency, drive new revenue and gain competitive advantages over business rivals.

***Audience:*** *IT; Admin* ***Format:*** *Panel*

***Presenters:*** *Ryan Deeds-The Crichton Group*

**Date/Time:** Thursday, Mar 23, 2017, 11:00 AM - 12:00 PM

**Session ID:** TEC231 **Room:** 105AB

**Session Title:** Cybersecurity

**Description**: "IT analyst forecasts are unable to keep pace with the dramatic rise in cybercrime, the ransomware epidemic, the refocusing of malware from PCs and laptops to smartphones and mobile devices, the deploymentof billions of under-protected Internet of Things (IoT) devices, the legions of hackers-for-hire, and the more sophisticated cyber-attacks launching at businesses, governments, educational institutions, and consumers globally". Will you be ready?

***Audience:*** *IT; Admin* ***Format:*** *Presenter/Panel*

***Presenters:*** *Adrian Mayers-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** TEC241 **Room:** 105AB

**Session Title:** Backup and Disaster Recovery Challenges

**Description**: Backups and replication are the foundation of a modern DR plan, and as such, it’s critical to ensure that the technology is working as it should – e.g., backups are automatic and reliable, the integrity of your data is upheld throughinline and offline validation, auditing is automated via failover virtualization and backups are replicated successfully to a secondary location. In simple terms, make sure your data is actually being backed up and replicated to an offsite location.

***Audience:*** *IT; Admin; Help Desk* ***Format:*** *Panel*

***Presenters:*** *Perry Myers-Peel & Holland, TBD*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** TEC251 **Room:** 105AB

**Session Title:** Social Media

**Description**: Social media has become a permanent fixture of our society, and it’s almost impossible to imagine a future without it. The brands might change and the platforms might evolve, but the social media concept is here to stay.How will you make it part of your organization...or will you?

***Audience:*** *IT; Admin; Help Desk* ***Format:*** *Panel*

***Presenters:*** *Tony Fronza-Conner Strong & Buckelew*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** TEC261 **Room:** 105AB

**Session Title:** Vertafore API Strategy

**Description**: Everything you wanted to know and more about API’s (Application Program Interface) and more. What they can mean for you and how can you leverage them. Theo Beak, Vertafore CTO, will lead the discussion and answer questions.

***Audience:*** *IT; Admin* ***Format:*** *Presenter*

***Presenters:*** *Theo Beack-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** TEC311 **Room:** 105AB

**Session Title:** Cloud Technology

**Description**: Cloud computing is a buzzword that means different things to different people. For some, it's just another way of describing IT (information technology) "outsourcing"; others use it to mean anycomputing service provided over the Internet or a similar network; and some define it as any bought-in computer service you use that sits outside your firewall. However we define cloud computing, there's no doubt it makes most sense when we stop talkingabout abstract definitions and look at some simple, real examples—so let's do just that.

***Audience:*** *IT; Admin; Help Desk* ***Format:*** *Panel*

***Presenters:*** *Michelle Hoffert-Lanier Upshaw, Ommie Rivera-Murray Securus*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** TEC321 **Room:** 105AB

**Session Title:** Outsourcing

**Description**: Is there more to outsourcing than the bottom line? What are the other reasons companies choose this route? What about ramifications for aspects of your business that are not so easily quantified?

***Audience:*** *IT; Admin; Help Desk* ***Format:*** *Presenter*

***Presenters:*** *Perry Myers-Peel & Holland, Ommie Rivera-Murray Securus*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** TEC331 **Room:** 105AB

**Session Title:** Open Mic

**Description**: Open Mic is designed for anyone to raise any topic and have it discussed with everyone in the room. This will allow you to interact with your peers to help you with an existing problem in your organization or simply to answer a question youalways wanted to know. This session is high energy with great discussion

***Audience:*** *Open* ***Format:*** *Open Forum*

***Presenters:*** *Joe Rukas-Conner Strong*

# ReferenceConnect

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** REF211 **Room:** 201AB

**Session Title:** Ask the expert panel

**Description**: Bring your toughest questions and get them answered by a trusted industry expert. This open panel discussion will feature experts from AM Best, IRMI, NUCO, RoughNotes, and Martin & Co.who will help guide you to solve your toughest insurance questions using their expertise and the myriad resources available in ReferenceConnect.

***Audience:*** *Retail/Wholesale Agencies/Brokerages-All Skill Levels* ***Format:*** *Panel*

***Presenters:*** *Monica McCool- Vertafore, Shirley Van Ginkel-Vertafore, Susan Hart-AM Best, Jack Gibson-IRMI, Paul Martin-Martin & Co, Christine Barlow-NUCO, Linda Ferguson-Rough Notes*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** REF221 **Room:** 110AB

**Session Title:** ReferenceConnect: Product Keynote – Largest Information Hub in the IA Channel

**Description**: Reference Connect is the largest insurance industry information hub for the independent channel. This session will highlight how carriers, mgas, and agents use the power of our connected network to write more businessefficiently and accurately. We will also review new capabilities including additional information tools, search improvements, sharing your internal documents to create a virtual office in the field putting the knowledge you need at your fingertips anytim

***Audience:*** *Retail/Wholesale Agencies/Brokerages-All Skill Levels* ***Format:*** *Presenter*

***Presenters:*** *Monica McCool-Vertafore, Shirley Van Ginkle- Vertafore, Dave Acker-Vertafore, Ryan Smith-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** REF251 **Room:** 201AB

**Session Title:** ReferenceConnect: Up your game and win more business

**Description**: Insurance is a knowledge-based industry and whether you’re a carrier, mga, or broker, fully understanding the risk is the name of the game. Learn how to up your game and compete as arisk advisor instead of on price via real-world examples that use tools available in ReferenceConnect to help you win more business from quote to bind to issue to renewal.

***Audience:*** *Retail/Wholesale Agencies/Brokerages-All Skill Levels* ***Format:*** *Presenter*

***Presenters:*** *Monica McCool- Vertafore, Shirley Van Ginkel-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** REF411 **Room:** 105AB

**Session Title:** Train new employees and avoid brain drain

**Description**: About one-fifth of the U.S. population will be 65 or older by the year 2030. Are you ready to outrun the silver tsunami “brain drain” by equipping the next wave of insurance professionals to succeed? This session willcover best practices on what you need to know from recruitment to hire to retention, and you will walk away with a toolset that you can access anytime, anywhere via ReferenceConnect.

***Audience:*** *Retail/Wholesale Agencies/Brokerages-All Skill Levels* ***Format:*** *Presenter*

***Presenters:*** *Monica McCool-Vertafore, Joyce Sigler-Jones-Wenner*

# Sircon

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** SIR311 **Room:** 205A-C

**Session Title:** Sircon at Your Service

**Description**: From M&A support to special projects to full outsourcing and anywhere in between, learn how the Services team at Sircon can help take care of your licensing needs.

***Audience:*** *Carrier / Agency, Products: All Sircon* ***Format:*** *Presenter*

***Presenters:*** *Jay Davis-Vertafore, Scott Gillahan-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** SIR321 **Room:** 205A-C

**Session Title:** Tips for Keeping up With Licensing Trends

**Description**: Licensing is a critical part of your business, but the regulations are always changing. Join us as we take a look at the latest regulations and share some of our secrets on keeping up with changes throughout the year.

***Audience:*** *Carrier / Agency, Products: All Sircon* ***Format:*** *Presenter*

***Presenters:*** *Jay Davis-Vertafore, Tim Owen- Vertafore, Sydney Beaudreault-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** SIR331 **Room:** 201AB

**Session Title:** Open Forum with Sircon

**Description**: This is your chance to bring up any topics that are on your mind. Get feedback from the Sircon team and your peers. This tends to be a very lively discussion.

***Audience:*** *Carrier / Agency, Products: All Sircon* ***Format:*** *Round Table*

***Presenters:*** *Chris Gillespie\*-Vertafore, Tim Owen-Vertafore, Patrick Masi-Vertafore, Scott Gillahan-Vertafore, Jay Davis-Vertafore*

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** SIR411 **Room:** 107AB

**Session Title:** Open Forum with Sircon REPEAT

**Description**: This is your chance to bring up any topics that are on your mind. Get feedback from the Sircon team and your peers. This tends to be a very lively discussion.

***Audience:*** *Carrier / Agency, Products: Producer Manager, Producer Exchange* ***Format:*** *Round Table*

***Presenters:*** *Chris Gillespie\*-Vertafore, Tim Owen-Vertafore, Patrick Masi-Vertafore, Scott Gillahan-Vertafore, Jay Davis-Vertafore*

# Executive Leadership

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** EXE241 **Room:** 110AB

**Session Title:** 7 Things You Need To Do To Develop Your Team

**Description**: Teams are not simple; however, a good manager can make it look like they are. There are basic principles involved in team building and you, as a superior, play a key role. Keep in mind that people are not always going to agree on everything or anything,but good team members can at least understand one another, and, it’s part of your job to make sure that happens! Poor communication? Poor team! What You’ll Learn: • Define the four stages of team development , their purpose, and challenges inherent tothe stage • Understand the differences between leadership and team’s perceptions. • Create an action plan and guidelines to capture development opportunities. • Develop a participatory style. • Create guidelines for clear and concise communication

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Presenter*

***Presenters:*** *Carletta Clyatt SVP-Omnia Group*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** EXE251 **Room:** 110AB

**Session Title:** Training Plans and Transferring the Knowledge

**Description**: How Do you Onboard New Employee? Are you using your existing tools for onboarding? Do you have written procedures? Do you have a plan for the first 90 days? Does your plan include measurable checkpoints? Are there “Go”...”No Go” checkpoints? Thissession will help you answer all of these questions to design an onboarding plan that develops confident and capable new employees! In this session we will discuss the task, system tools and staff as part of your onboarding process and agency success.

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Presenter*

***Presenters:*** *Angela Ford-Angela Adams Consulting*

**Date/Time:** Thursday, Mar 23, 2017, 4:15 PM - 5:15 PM

**Session ID:** EXE261 **Room:** 110AB

**Session Title:** Growth Through Acquisition

**Description**: Options for growth (organic vs. acquisition). Planning and Fundamentals, target assessment, deal structuring and execution/integration.

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Presenter*

***Presenters:*** *Mike Strakhov CPCU-Live Oak Bank*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** EXE311 **Room:** 110AB

**Session Title:** Agency Carrier Round Tables

**Description**: Ever wish you had the ear of agency technology leaders at the carriers you partner with? Would you like to hear first-hand about your carriers and Vertafore’s upcoming roadmaps regarding connectivity priorities? This is your opportunity to learnand make your voice heard -- and the reasons why you participate in NetVU Conference! Join fellow agency leaders, your carriers’ and Vertafore leadership for valuable discussions on key insurance automation priorities, your agency’s priorities and ideasto keep moving initiatives forward. Session format allows agencies to focus their feedback with one or two carrier partners. This session is open to leaders in agencies and NetVU Corporate Partner carriers and by invitation only. Join these carriersfor this popular session CHUBB, The Cincinnati Companies, EMC, The Hanover Insurance Group, Liberty Mutual, The Motorists Insurance Group, Nationwide, Progressive, Selective, Travelers, and Westfield.

***Audience:*** *CEO/Executives/Business Managers/Carriers* ***Format:*** *Round Table*

***Presenters:***

**Date/Time:** Friday, Mar 24, 2017, 2:45 PM - 3:45 PM

**Session ID:** EXE321 **Room:** 110AB

**Session Title:** Workplace Flexibility and Remote Work Best Practices

**Description**: Technology has transformed every part of our work and life. The 9-to-5 workday has been rapidly disappearing as more employees do some of their job outside the office.This seminar will discuss the various types of remote-work options and best practices for organizations to implement a successful remote work and work-life fit program.

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Presenter*

***Presenters:*** *Sharon Emek-WAHVE*

**Date/Time:** Friday, Mar 24, 2017, 4:00 PM - 5:00 PM

**Session ID:** EXE331 **Room:** 110AB

**Session Title:** Special Session-INVITATION ONLY

**Description**: Special Session-INVITATION ONLY

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Presenter*

***Presenters:***

**Date/Time:** Saturday, Mar 25, 2017, 9:00 AM - 10:00 AM

**Session ID:** EXE411 **Room:** 110AB

**Session Title:** Leading with Certainty in Uncertain Times

**Description**: Business life will always be a roller coaster ride of surprise, excitement, fear, and accomplishment. How an individual handles ups and downs is what separates the resilient from the rest. This fast-paced program will offer participants insight and toolsto be an effective and valuable leader. Topics will include how to: • Identify changes and challenges in your clients and business partners • Understand and manage personal uncertainty • Lead and influence positive change within your team

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Presenter*

***Presenters:*** *Emily Huling President-Selling Strategies*

**Date/Time:** Saturday, Mar 25, 2017, 10:15 AM - 11:15 AM

**Session ID:** EXE421 **Room:** 110AB

**Session Title:** Executive Tools-See a variety of tools aimed at making the busy executive more productive

**Description**: Join a panel of your peers in a lively discussion about the latest in the solutions available to make the most of your work time, including note-taking, scheduling and calendar management, social media management

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Panel*

***Presenters:*** *Moderator & Speaker Steve Anderson, Others-TBD*

**Date/Time:** Saturday, Mar 25, 2017, 11:30 AM - 12:30 PM

**Session ID:** EXE431 **Room:** 110AB

**Session Title:** Change Management - Managing Change in Your Agency

**Description**: Managing change, overcoming resistance to change, dynamics of change, results of change. Participants can be expected to learn how to manage the process of change within the agency staff. Biggest obstacles to owners aretrying to implement new systems or processes and employees resist those changes.

***Audience:*** *CEO/Executives/Business Managers* ***Format:*** *Presenter*

***Presenters:*** *Ron Harrell Sr Solution Consultant-Vertafore*

# Young Professionals

**Date/Time:** Thursday, Mar 23, 2017, 8:30 AM - 9:30 AM

**Session ID:** YPC211 **Room:** 107AB

**Session Title:** Website development and optimization

**Description**: Is your agency's website still just an electronic brochure? If so, you need to come to this session to learn how to get your website into the 21st century.

***Audience:*** *All* ***Format:*** *Speaker*

***Presenters:*** *TBD*

**Date/Time:** Thursday, Mar 23, 2017, 9:45 AM - 10:45 AM

**Session ID:** YPC221 **Room:** 107AB

**Session Title:** Social media do's and don’ts - Engaging your social media audience

**Description**: Everyone is familiar with social media. However, do you know how to stay on message without boring your followers with too much insurance information? Come to this session to learn some social media best practices for agencieswho want engaged audiences.

***Audience:*** *All* ***Format:*** *Speaker*

***Presenters:*** *TBD*

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 2:45 PM

**Session ID:** YPC241 **Room:** 107AB

**Session Title:** Competing With Innovative Technology in the Independent Market

**Description**: Direct writers are spending billions of dollars on advertising and technology. How can you compete against that as an independent agent? Come to this session and hear from one of the industry’s experts on how you can compete – and succeed– in today’s marketplace.

***Audience:*** *All* ***Format:*** *Speaker*

***Presenters:*** *TBD*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 4:00 PM

**Session ID:** YPC251 **Room:** 107AB

**Session Title:** Sales and marketing automation solutions – what might work for your firm?

**Description**: Come join roundtable discussions to learn about some of the tools that agencies are using to help automate their sales and marketing proess.who want engaged audiences.

***Audience:*** *All* ***Format:*** *Round Table*

***Presenters:*** *TBD*

**Date/Time:** Friday, Mar 24, 2017, 1:30 PM - 2:30 PM

**Session ID:** YPC311 **Room:** 107AB

**Session Title:** Leveraging the Young Talent in Your Organization

**Description**: How do you make the most of the young talent in your agency? Attend this session to hear examples of how successful agencies developed and leveraged young talent.

***Audience:*** *All* ***Format:*** *Panel*

***Presenters:*** *TBD*

# Vertafore Connectivity Forum - Special Sessions for Insurance Carrier Personnel and Industry Experts

**Date/Time:** Thursday, Mar 23, 2017, 1:45 PM - 1:55 PM

**Session ID:** VER211 **Room:** 106A-C

**Session Title:** VCF-Opening & Intros

**Description**: Opening & Intros

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Presenter*

***Presenters:*** *Dave Acker-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 1:55 PM - 2:10 PM

**Session ID:** VER221 **Room:** 106A-C

**Session Title:** VCF-Introduction and Welcoming Remarks

**Description**: Introduction and welcoming remarks

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Presenter*

***Presenters:*** *Amy Zupon-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 2:10 PM - 2:30 PM

**Session ID:** VER231 **Room:** 106A-C

**Session Title:** VCF-Sircon Connected Compliance

**Description**: Learn about “Sircon Connected Compliance” and why it is better and different than how carriers and agencies interact today for establishing and maintaining compliant selling/servicing relationships.

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Presenter*

***Presenters:*** *Tim Owen-Vertafore, Patrick Masi-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 2:30 PM - 2:50 PM

**Session ID:** VER241 **Room:** 106A-C

**Session Title:** VCF-Leveraging ReferenceConnect to Become a "Carrier of Choice"

**Description**: Understand how to separate yourself from the average carrier and better improve your information flow as a Carrier of Choice for your agents. Providing product information such as appetite guides & market availability, required and conditional forms, andendorsements, easily and hassle-free, ReferenceConnect can be the differentiator in an independent agency’s portfolio of carriers

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Presenter*

***Presenters:*** *Monica McCool-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:00 PM - 3:25 PM

**Session ID:** VER251 **Room:** 106A-C

**Session Title:** VCF-Vertafore Rating Road Map

**Description**: Trying to figure out the strategic direction of Vertafore’s rating business? This session will give a broad overview of the direction of the PLR, FSC and QQ WebRater products as well as some of the new upcoming releases to offer customers an“embedded rating” experience vs. an “integrated” one

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Presenter*

***Presenters:*** *Dave Bevan-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:25 PM - 3:50 PM

**Session ID:** VER261 **Room:** 106A-C

**Session Title:** VCF-Vertafore Connectivity updates

**Description**: Get an update on the variety of activities going on related to connectivity between our agency management systems and the carriers Vertafore serves. Topics will include TransactNOW and Guidewire integration as well as additional updates onID Federation, Download and an intro to our new Book Roll capabilities

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Presenter*

***Presenters:*** *Nellie Massoni-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 3:50 PM - 4:30 PM

**Session ID:** VER271 **Room:** 106A-C

**Session Title:** VCF-Connectivity Panel Expert Agent Feedback

**Description**: You’ll have the unique opportunity to interact with some of our industry’s most enlightened and progressive agents. Find out what they are doing with information and technology – as well as what is needed/expected from their carrier partnersin order to stay relevant in the ever changing digital marketplace

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Panel*

***Presenters:*** *Bruce Winterburn-Vertafore*

**Date/Time:** Thursday, Mar 23, 2017, 4:30 PM - 4:45 PM

**Session ID:** VER281 **Room:** 106A-C

**Session Title:** VCF-Q & A and Closing Remarks

**Description**: Q & A and Closing Remarks

***Audience:*** *Insurance Carrier Personnel/Industry Experts* ***Format:*** *Presenter*

***Presenters:*** *Dave Acker-Vertafore*

# Vertafore Business and Product Keynotes

**Date/Time:** Friday, Mar 24, 2017, 8:45 AM - 9:30 AM

**Session ID:** VER313 **Room:** 108

**Session Title:** What's New in QQCatalyst?

**Description**: Hear the latest in QQCatalyst

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Dickinson Merrin-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 8:45 AM - 9:30 AM

**Session ID:** VER311 **Room:** 101C-E

**Session Title:** What's New in Sagitta?

**Description**: Here the latest in Sagitta updates

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Bruce Westman-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 8:45 AM - 9:30 AM

**Session ID:** VER316 **Room:** 102B

**Session Title:** What's New in AIM?

**Description**: Hear the latest in AIM updates

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Neville Allen-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 8:45 AM - 9:30 AM

**Session ID:** VER314 **Room:** 104AB

**Session Title:** What's New in BenefitPoint?

**Description**: Hear the latest in BenefitPoint

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Michelle Lewis-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 8:45 AM - 9:30 AM

**Session ID:** VER315 **Room:** 104CD

**Session Title:** What's New in ImageRight?

**Description**: Hear the latest in ImageRight/WorkSmart updates

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Vijay Muniswamy-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 8:45 AM - 9:30 AM

**Session ID:** VER317 **Room:** 104E

**Session Title:** What's New in Sircon

**Description**: Hear the latest in Sircon updates

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Patrick Masi-Vertafore, Scott Gillahan-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 8:45 AM - 9:30 AM

**Session ID:** VER312 **Room:** 207A-D

**Session Title:** What's New in VAP/360 & My Agency Reports?

**Description**: Hear the latest in Vertafore Agency Platform, AMS360 and My Agency Reports

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Kevin Pham-Vertafore, Kerri Urrutia-Vertafore, Jeff Parrish-Vertafore, Doug Mohr-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER321 **Room:** 101C-E

**Session Title:** How do you sell in a competitive P&C Market, know your customer's needs? Small Agency Focus

**Description**: Product focus: ReferenceConnect, Client Portal and Rating

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Ryan J Smith-Vertafore, Eric Heltzer-Vertafore, Janine Root-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER329 **Room:** 102A

**Session Title:** Innovative Network at your Fingertips - MGA/MGU Focus

**Description**: Product Focus: Prevail Network

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Eric Mathis-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER328 **Room:** 102B

**Session Title:** Why can't we be friends? Let your technology talk to my technology. MGA/MGU Focus

**Description**: Product Focus: ImageRight/AIM, FinancePro, DocuSign

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Karyn Fowler-Vertafore, Neville Allen-Vertafore, Neil Snowdon-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER326 **Room:** 103A-C

**Session Title:** Saving you time and money, it's all about Operational Efficiency-Carrier Focus

**Description**: Product Focus: ReferenceConnect, Sircon, DaaS

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Monica McCool-Vertafore, Patrick Masi-Vertafore, Steven Finch-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER324 **Room:** 104AB

**Session Title:** From Quote to Close-Grow Your Book of Business-Producer Focus

**Description**: Product Focus: Rating, TransactNOW

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Dave Bevan-Vertafore, Nellie Massoni-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER325 **Room:** 104CD

**Session Title:** eCommerce and Insurance Selling in the Digital Era-Producer Focus

**Description**: Product Focus: Client Portal, DocuSign

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Scott Lundquist-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER327 **Room:** 104E

**Session Title:** All about Workflow! -Carrier Focus

**Description**: Product Focus: ImageRight

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Nitish Venkatesh-Vertafore, Deb Ward-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER323 **Room:** 106A-C

**Session Title:** My business is growing and becoming more complex, how can I stay operationally efficient? Large Agency Focus

**Description**: Product Focus: WorkSmart, Sircon Solutions

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Vijay Muniswamy-Vertafore, Tim Owen-Verafore*

**Date/Time:** Friday, Mar 24, 2017, 9:45 AM - 10:30 AM

**Session ID:** VER322 **Room:** 205A-C

**Session Title:** It's all about a Happy CSR-Medium Agency Focus

**Description**: Product Focus: WorkSmart

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Janice Pierson-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER334 **Room:** 108

**Session Title:** Premium Finance Business Made Easy Producer Focus

**Description**: Product Focus: FinancePro

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Neil Snowdon-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER331 **Room:** 101C-E

**Session Title:** What's your Differentiator? Technology! Small Agency Focus

**Description**: Product Focus: Client Portal, Mobile, DocuSign

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Scott Lundquist-Vertafore, Kerri Urrutia-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER339 **Room:** 102A

**Session Title:** All About Workflow! - MGA/MGU Focus

**Description**: Product Focus: ImageRight

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Nitish Venkatesh-Vertafore, Deb Ward-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER338 **Room:** 102B

**Session Title:** Gain Insight: Take Action. Make an Impact MGA/MGU Focus

**Description**: Product Focus: ImageRight, Process Downloads only

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Vijay Muniswamy-Vertafore, Michael Williams-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER336 **Room:** 103A-C

**Session Title:** See the Forest through the Trees, Making Sense of Your Data Carrier Focus

**Description**: Product Focus: Carrier Analytics, ReferenceConnect, BookRoll

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Joanne MacCaul-Vertafore, Monica McCool-Vertafore, Nellie Massoni-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER335 **Room:** 104CD

**Session Title:** Supercharge your selling with Vertafore CRM Tools Producer Focus

**Description**: Product Focus: SalesTrack

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Eric Heltzer-Vertafore, Ron Harrell-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER337 **Room:** 104E

**Session Title:** Focus on Strategy, Not Technology Carrier Focus

**Description**: Product Focus: DaaS

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Steven Finch-Vertafore, Hani Esso-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER333 **Room:** 106A-C

**Session Title:** Data, Data, Data Large Agency Focus

**Description**: Product Focus: Vertafore Analytics (All Dashboards)

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Sheri Prout-Vertafore, Bill Henson-Vertafore*

**Date/Time:** Friday, Mar 24, 2017, 10:45 AM - 11:30 AM

**Session ID:** VER332 **Room:** 205A-C

**Session Title:** Add Value to your Value-Add Medium Agency Focus

**Description**: Product Focus: BenefitPoint, ReferenceConnect

***Audience:*** *Product Users* ***Format:*** *Presenter*

***Presenters:*** *Michelle Lewis-Vertafore, Ryan J Smith-Vertafore*