

Date	Time	Course #	Track	Title	Room	Level	Target	Description	Speaker(s)
Friday, March 04, 2016	8:00 a.m. - 8:30 a.m.	4101	AMS360-Account Manager	Suspense (resuspending, suspend to someone else, setup)	217A	ALL	ALL	As the first place many CSRs start each day, Suspense is a vital tool. Discuss how to use them, how and when to resuspend an item, copying someone on a suspense, or setting a Suspense for someone else. Figure out how to stay on top of your unfinished business.	Stephanie Zuck, Craft Agency, Inc.
Friday, March 04, 2016	8:30 a.m. - 9:00 a.m.	4102	AMS360-Account Manager	Activity/Activity Group Setup	217A	ALL	ALL	Activities not only protect us in the event of an E&O claim, they also allow us to find items and communication more easily. Join this session to hear how to customize your Activity list and create Activity Groups. Small changes can make finding Activities much easier.	Sarah Walls, Ragland, Strother, LaFitte Susan Brunson, Herbie Wiles insurance
Friday, March 04, 2016	8:00 a.m. - 8:30 a.m.	4103	AMS360-Admin	Activity/Claims Download	209	All	ALL	Save yourself time and get company documents faster with Activity and Claims Download. Companies want to push their documents to you rather than making you go to their website. Learn how other agencies are using it and what else is coming from this great advancement.	Laurie Gillam, Gardiner Allen DeRoberts Insurance Cathy Hall, Forest Agency Nellie Massoni, Vertafore
Friday, March 04, 2016	8:30 a.m. - 9:00 a.m.	4104	AMS360-Admin	Download-Reports, Corrections	209	All	ALL	Download is always a hot topic and a huge time saver! Learn how to incorporate Download into your everyday life. From pulling Download files into AMS360, assigning them to insureds, reporting, and corrections this class will cover it. Turn download on effectively for all your companies. Note, this session will not cover how to setup Download in your agency.	Laurie Gillam, Gardiner Allen DeRoberts Insurance Cathy Hall, Forest Agency Nellie Massoni, Vertafore
Friday, March 04, 2016	9:00 a.m. - 9:30 a.m.	4105	AMS360-Admin	Connectivity Roundtable	209	All	ALL	Take what you learned in Activity/Claims Download and the Download sessions to discuss with others how they are using it and how you can incorporate it in your office. This roundtable will allow you to create a plan with your peers to take back to your agency.	Laurie Gillam, Gardiner Allen DeRoberts Insurance Cathy Hall, Forest Agency Nellie Massoni, Vertafore
Friday, March 04, 2016	8:00 a.m. - 8:30 a.m.	4106	AMS360-Accounting	Accepting DB Payments in the Office	214C	ALL	ALL	Whether you accept them or not, insureds will always try to pay their Direct Bill premium in your office. Discuss different ways of handling them and how AMS360 makes it easy to track these payments.	Janet Tuttle, TDECU insurance Agency, LLC Venus Tondreau, Lake Michigan Insurance Agency
Friday, March 04, 2016	8:30 a.m. - 9:00 a.m.	4107	AMS360-Accounting	Accepting Credit Card Payments in the Office	214C	ALL	ALL	This session will allow you to discuss this hot NCOM topic. See how others are accepting credit cards payments, or why not. Learn how you can process the accounting in AMS360 and make your customers happy.	Janet Tuttle, TDECU insurance Agency, LLC Venus Tondreau, Lake Michigan Insurance Agency
Friday, March 04, 2016	9:15 a.m. - 10:00 a.m.	4108	AMS360-Accounting	Tracking DB Deposit Receipts	214C	ALL	ALL	You've accepted DB payments and credit card payments in the office, learn how to track the DB Deposit receipts in AMS360. This session will allow you to take your customer payments, upload them to the carrier, and track it all!	Alisa Sutman, Field and Main Insurance
Friday, March 04, 2016	9:00 a.m. - 9:15 a.m.	4109	AMS360-Account Manager	Suspense/Activity Roundtable	217A	ALL	ALL	Discuss with your peers what you learned in the Suspense/Activity class. Discuss with others the best way to use them in your office.	Stephanie Zuck, Craft Agency, Inc. Sarah Walls, Ragland, Strother, LaFitte Susan Brunson, Herbie Wiles insurance
Friday, March 04, 2016	8:00 a.m. - 12:15 p.m.	4111	Vertafore Agency Platform	Personal Lines and Commercial Lines Day In the Life	217D	All	All	All things Vertafore Agency Platform, including Account Management, Accounting and Administration Features	Joyce Sigler, Jones-Wenner
Friday, March 04, 2016	8:00 a.m. - 8:45 a.m.	4121	Sagitta-CL	Life Cycle of An Account	214B	All	All	Marketing process, New business, Renewal business, data entry (client units, import/export, copy/merge, defaults, miscellaneous coverages vs user defined pages, download), questionnaires, delivery of documents/applications.	Dawn Mathews, IMA Kelly Bolton, Dowling & O'Neill
Friday, March 04, 2016	8:45 a.m. - 9:15 a.m.	4122	Sagitta-CL	Policy Management	214B	All	All	Policy transactions that take place during the life of a policy, data entry, TransactNow, Download, document delivery.	Dawn Mathews, IMA Carol Luebbehusen, Higginbotham Ins. Melissa Crosno, Lipscomb & Pitts

Friday, March 04, 2016	8:00 a.m. - 8:45 a.m.	4123	Sagitta-PL	Life Cycle of an Account	212	All	All	Marketing process, New business, Renewal business, data entry (download, specialty business that is not downloaded), TransactNow, carrier web sites, questionnaires, delivery of documents and applications.	Ciindy Levron, USI Beth Jerauld, Mesirow Ins.
Friday, March 04, 2016	8:45 a.m. - 9:15 a.m.	4124	Sagitta-PL	Policy Management	212	All	All	Policy transactions that take place during the life of a policy, data entry, TransactNow, Download, document delivery.	Ciindy Levron, USI Beth Jerauld, Mesirow Ins.
Friday, March 04, 2016	8:00 a.m. - 8:30 a.m.	4125	Sagitta-Accounting	Personalizaation	210A	All	All	In this session, we will discuss accounting flag maintenance, role based security, import/export, and insurer and payee personalization.	Amy Erickson, Regions Ins. April Michaelis, IMA
Friday, March 04, 2016	8:45 a.m. - 9:15 a.m.	4126	Sagitta-Accounting	Agency Receivables	210A	All	All	Discuss best practices for your receivables team and some of the tips and tricks to make the process as efficient as possible.	Justin Murphy, Dowling & O'Neill Wendy Larson, Moreton & Company
Friday, March 04, 2016	8:00 a.m. - 8:35 a.m.	4127	Sagitta-Admin	Backup/Restore	213B	All	All	Join in this panel discussion regarding backup/restore.	Angie Sibley, J. Smith Lanier Todd Doster, MHB
Friday, March 04, 2016	8:35 a.m. - 9:15 a.m.	4128	Sagitta-Admin	Archive/Purge	213B	All	All	Learn from this panel discussion with your peers that use the Sagitta Archive/Purge. Find out when they use it, how often, suggestions on how to get started and what benefits they have gained from using the archive/purge feature.	Allyne Miller, Allen-Lawrence Stephanie Proctor, BB&T
Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4131	BenefitPoint-Account Manager	Account Setup	214D	All	All	In this session, we will discuss the framework and best practices of setting up new clients in Benefit Point. We will look at how using the standard data fields can help create useful benchmark reports. We will also discuss why creating custom fields can help capture data for checklists, audits and service deliverable reports.	Chris Walters-USI Kristi Barnes, Wortham Sara Fish, CHS, Inc. Shelly Ma, ABD Brent Rineck, ABD Michelle Lewis, Vertafore
Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4132	BenefitPoint-Accounting	How to Beging Using RTM	217C	All	Accounting	In this session, we will show how to set up statement headers, splits, and payees as well as other general RTM procedures.	Brett Kerfoot, Conner Strong & Buckelew Victoria Jackson, Marsh & McLennan Angela Minutaglio, Marsh & McLennan Hope Wood, Tompkins Laura Morales, Vertafore
Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4133	BenefitPoint-New Agency	Pre-Go Live Part 1	210B	All	New Agency	During this first portion of the New Agency track we will discuss planning that should occur prior to going live on the system, including garnering management support, and appropriate expectation setting. There will also be a targeted focus on data, and building the framework needed for our various agency stakeholders now and into the future. The format of this session will incorporate presentation, team discussion and workgroup activity.	Vanessa Kinney, Hylant Crisanna Lin, Higginbotham Kelly Schleicher, Diebold Mindy Day, Vertafore
Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4134	BenefitPoint-System Admin	Auditing Data	207B	All	Sys Admin	In this session attendees will learn how to audit and inspect your data. We will discuss setting standards for how you want data to be entered, choosing the right carriers for consistency across your agency, getting accurate data you trust for reporting, and building data for inclusion in aggregate benchmarking. The session will include a review of reports like Rates Audit, Contributions Audit and Benefits Attributes, among others.	Craig McDonald, Arthur J. Gallagher Colleen Doherty, Eastern Benefits Tony Fronza, Conner Strong Buckelew Sheri Weaver, HNI Risk Services
Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4151	QQCatalyst	Using QQCatalyst To Grow Your Agency	208	All	All	Learn how to use Dashboard and Widget Gallery for immediate visibility into your book of business and work in progress. Run reports to show Closing Ratios, Total Production and Quote Cycles. Schedule emails to communicate with exitsting clients and prospects.	Dickinson Merrin, QQSolutions/Vertafore

Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4181	WorkSmart	Agency/ Carrier Roundtables	216	All	AP-PR	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 learn and 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 ideas to keep moving initiatives forward. Session format allows agencies to focus their feedback with one or two carrier partners. This session is open to agencies and NetVU Corporate Partner carriers, including: Chubb, The Cincinnati Insurance Companies, CNA, EMC, The Hanover Insurance Group, The Hartford, Liberty Mutual Insurance, MetLife Auto & Home, The Motorists Insurance Group, Nationwide, Progressive, Selective, Travelers, Westfield.	Roundtables
Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4191	Carrier-ImageRight	Product Keynote - ImageRight	206	All	All	Content management and workflow needs are evolving and require more robust systems to streamline the complexities of your business. Vertafore has made significant investments in ImageRight to help you adapt as your business changes. Join us to learn more about the latest ImageRight innovations and solutions to meet your growing 'Enterprise Content Management' demand. These innovations facilitate greater scalability, enhanced 'User Experience' and business processes, along with the introduction of a 'Process Dashboard'. These new enhancements will not only allow you to better meet the needs of your current business but also open new ways to apply ImageRight to other markets such as Sircon and Healthcare.	Neil Snowdon, Vertafore Vijay Muniswamy, Vertafore Karyn Fowler, Vertafore
Friday, March 04, 2016	8:00 a.m. - 9:15 a.m.	4192	Carrier-Sircon	Product Keynote: Sircon	218	All	All	Ensuring an agent is authorized to sell requires collaboration across the entire insurance industry. This presentation will walk you through the producer lifecycle and how Sircon solutions are connecting agencies, producers, carriers, education providers and regulators to not only improve compliance, but deliver a more efficient process to the industry	Dane Sprecher, Vertafore Tim Owen, Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:15 a.m.	4201	AMS360-Account Manager	New Insured Setup	217A	ALL	ALL	Setting up a new insured is more important than you might think. Having the appropriate fields completed, and completed correctly can make your life easier down the road. This session will discuss best practices as you setup insureds and how is can affect other areas of AMS360 and corresponding products.	Sarah Walls, Ragland, Strother, LaFitte Nadine Weilersbacher, E R Munro
Friday, March 04, 2016	10:15 a.m. - 10:45 a.m.	4202	AMS360-Account Manager	Doc360	217A	ALL	ALL	Mail is a big part of our day. Learn how to utilize Doc360 to have all your mail delivered to AMS360, sort, and attach it easily in AMS360. We will discuss naming conventions and ways to keep the paper off your desk.	Susan Brunson, Herbie Wiles insurance Kathy Hodges, Dillon Insurance
Friday, March 04, 2016	9:45 a.m. - 11:15 a.m.	4203	AMS360-Admin	Adding a new Employee- Open Discussion AMS360 & VSSO, Giving Carrier access and around the office	209	All	ALL	There's a long list of To Dos when a new employee starts. Learn how to add new employees in AMS360 and through Vertafore Single Sign-On (VSSO). Also, discuss adding the new employee to carriers and other steps to add them to your agency.	Whitney Malone, Gardiner Allen DeRoberts Insurance
Friday, March 04, 2016	10:00 a.m. - 10:45 a.m.	4204	AMS360-Accounting	Deposits- Additional Receipts & EFTS	214C	ALL	ALL	Whether it's for an Agency Bill or Direct Bill account, in this session learn how to generate a deposit, add additional receipts that were already posted in AMS360, and create EFT receipts.	Janet Tuttle, TDECU insurance Agency, LLC

Friday, March 04, 2016	9:30 a.m. - 10:15 a.m.	4221	Sagitta-CL	Workflow/Document Management Integration	214B	All	All	Workflow Designs (creating, changing, broad vs detailed), email receivers, Sagitta sync, training, Engage, tips & tricks.	Karol Krytusa, Bailey Haskell Kate O'Toole, Seubert Julie Granhold, Bowen Miclette & Britt
Friday, March 04, 2016	10:15 a.m. - 10:45 a.m.	4222	Sagitta-CL	Client Interactions	214B	All	All	Sagitta vs WorkSmart (notes, activities, diaries, tasks), correspondence (letters, email templates, quick parts, signatures), document delivery (endorsements, audits, policies, schedules), document portals, i.e. Engage.	Dawn Mathews, IMA Lisa Vogeny, Amaden-Gay
Friday, March 04, 2016	9:30 a.m. - 10:15 a.m.	4223	Sagitta-PL	Workflow/Document Management Integration	212	All	All	Workflow Designs (creating, changing, broad vs detailed), email receivers, Sagitta sync, training, Engage, tips & tricks.	Liz Zybko, Haas & Wilkerson Nancy Dennis-Ortiz, Advanced Ins.
Friday, March 04, 2016	10:15 a.m. - 10:45 a.m.	4224	Sagitta-PL	Client Interactions	212	All	All	Sagitta vs WorkSmart (notes, activities, diaries, tasks), correspondence (letters, email templates, quick parts, signatures), document delivery (endorsements, audits, policies, schedules), document portals, i.e. Engage.	Nancy Dennis-Ortiz, Advanced Ins. Beth Shannon, Bowen Miclette & Britt
Friday, March 04, 2016	9:30 a.m. - 10:05 a.m.	4225	Sagitta-Accounting	Company Bill Receivables (Automated DB Reconciliations)	210A	All	All	Learn about all the options around direct bill automation and how to bring in your direct bill transactions even if you do not receive a download from the carrier.	Tiny Clay, Bank of America Carol Dunbar, J. Smith Lanier
Friday, March 04, 2016	10:05 a.m. - 10:45 a.m.	4226	Sagitta-Accounting	Payables-Carrier, Producer, Vendor	210A	All	All	Discuss the various methods of remitting payments to carriers, producers, and vendors and look at best practices to ensure your payables department is working at max efficiencies.	Kimberly Buck, Haylor, Fryer & Coon
Friday, March 04, 2016	9:30 a.m. - 10:10 a.m.	4227	Sagitta-Admin	Disaster Recovery	213B	All	All	Is your agency prepared for an unexpected natural disaster or data loss? Join this panel discussion to learn how to plan and prepare for a disaster, what measures to take and how to recover. Learn from those that have been through a crisis and were successful in overcoming it.	Michelle Hofferf, Lanier-Upshaw Anthony Fox, Crichton Group
Friday, March 04, 2016	10:10 a.m. - 10:45 a.m.	4228	Sagitta-Admin	In House vs Online	213B	All	All	Join this panel discussion of In House vs Online. What are the pros and cons between the two?	Michelle Hofferf, Lanier-Upshaw Tina Clay, Bank of America
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4231	BenefitPoint-Account Manager	Plan Management	214D	All	All	In this session, we will discuss best practices for managing plans within BenefitPoint. Topics for discussion include Multiple Option Plans, When and Why to separate lines of coverage, rates and commission schedules and RFPs.	Chris Walters-USI Kristi Barnes, Wortham Sara Fish, CHS, Inc. Shelly Ma, ABD Brend Rineck, ABD Michelle Lewis, Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4232	BenefitPoint-Accounting	Integration and Errors	217C	All	All	This session will be separate the class into two sections, Sagitta or AMS360 integrations. We will go through the different errors you may run into posting a statement or entering a policy/client. In addition the session will be interactive addressing specific issues attendees have run into and the fix to the issue.	Brett Kerfoot, Conner Strong & Buckelew Victoria Jackson, Marsh & McLennan Angela Minutaglio, Marsh & McLennan Hope Wood, Tompkins Laura Morales, Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4233	BenefitPoint-New Agency	Pre-Go Live Part 2	210B	All	New Agency	Building upon what discussed in the first session, we will continue down the Pre-Go Live process discussing the areas of "Set-Ups", Training and Documentation. "Set-Ups" encompass reviewing the different areas within the system which could be used to customize your agency's BenefitPoint experience. Including, creating the data standards needed for impactful reporting, standardized workflow, permissions and process. The format of this session will incorporate presentation, team discussion and workgroup activity.	Vanessa Kinney, Hylant Crisanna Lin, Higginbotham Kelly Schleicher, Diebold Mindy Day, Vertafore

Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4234	BenefitPoint-System Admin	User Tracking	207B	All	Sys Admin	In this session you will learn how to use audit log reports to view changes on accounts and plans, track user logins and usage, and regularly check user's permissions using Role Permissions Audit. All of this will enable you as the Administrator to track changes in information, user adoption and activity and ensure that users have the access (and only the access) they should.	Craig McDonald, Arthur J. Gallagher Colleen Doherty, Eastern Benefits Tony Fronza, Conner Strong Buckelew Sheri Weaver, HNI Risk Services
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4241	AIM	New Features & Major Improvements	211	All	All	Agency Information Manager (AIM) is a flexible, submission-based system that streamlines front-end activities for quoting, correspondence, binding, policy issuance and policy management to provide a more productive workforce. Over the years, Vertafore has made numerous enhancements to the system to improve the manageability and user experience such as XML import/export via AIM Web Services, AIM Firewall & Security, Organizations, Master Products and Datasets, and Document Designer. In this session, we will discuss major enhancements to the system since v.6.4.3 was released, including updates to the Help Menu, Accounting tab, improved integrations with other Vertafore products, and more.	Neville Allen, Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4251	QQCatalyst	How To Use QQCatalyst To Increase Client Retention	208	All	All	Use the Reports Library for Year-over-Year and Month-over-Month reports, Lost business, and more	Dickinson Merrin, QQSolutions/Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4261	WorkSmart	Make WorkSmart Work for Accounting Personnel	206	All	Accounting	A Day in the Life of an Accounting Staffer - What's your workflow from start to finish? Are you taking advantage of all the tools available to you? From file structures customized to meet your agency's specific needs, to payables and receivables workflows, to integrating your workflows with other departments in your agency, learn how to take full advantage of WorkSmart to streamline your accounting department.	Agency Rep, TBD Clint Rice, Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4262	WorkSmart	WorkSmart Security & Admin Functions	205	All	Security/Admin	Whether you are in ImageRight's Enterprise Management Console daily or only when forced, we have something for you in this session. The functionality and features in EMC are limitless - but you have to know how to take full advantage of them! Join us as we explore a day in the life of a WorkSmart admin! Discussion includes: -EMC Security -EMC Profiles/Policies -EMC Storage Management (file structure, attributes, page and file marks, templates) -BPR	Kevin Dickman-Tolman & Wiker Insurance Services, LLC Heather Donley, Stolly Insurance Group Chris Hartman, Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4271	Young Professionals	Remote Worker-Work At Home Best Practices	216	All	YP	Given the discussion during the Gen XYZ panel at the 2015 conference, we would like to develop a class based on Work At Home/Remote Work best practices. Panel discussion consisting of agencies who have successfully implemented work at home.	Panel
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4281	Executive Leadership	Disruptive Trends-A Special Session with Conference Keynote Speaker David Smith	217B	All	AP-PR-YP	Join Conference Keynote David Smith and attendees from the Executive/Sales track and the Young Professions track to discuss how industry acumen and ability help business owners to "change and grow" their firms by understanding the "disruptive trends" that are coming our way.	David Smith, CEO, Global Futures and Foresight LTD
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	4291	Carrier-ImageRight	Innovation Tools	207A	All	All	Attend this session to see many innovative solutions we are planning to build within ImageRight. This will be a perfect opportunity for you to share your own ideas and concepts with our Vertafore product team	Vijay Muniswamy, Vertafore Karyn Fowler, Vertafore
Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4292	Carrier-Sircon	Carrier Case Study: The Benefits of Automating Producer Management	218	All	CAR	Adopting the latest automation tools for producer lifecycle management can have serious benefits for your organization. In this session, hear a customer explain how they have utilized Sircon solutions to bring value to their business.	Dane Sprecher, Vertafore Tim Owen, Vertafore

Friday, March 04, 2016	9:30 a.m. - 10:45 a.m.	4293	Carrier-Connectivity & Rating	Carrier/Agency Panel: Adoption of Real-Time and Download	214A	Basic	All	In this session, panelists representing both carriers and agencies will discuss pain –points around adoption of real-time and download tools, and brainstorm ways to tackle the objections on both sides (e.g., carriers / MGAs not wanting to expand capabilities, and agencies not using capabilities already provided). The goal is to be able to demonstrate ROI in real ways, for carriers, agents and MGAs.	Nellie Massoni, Vertafore
Friday, March 04, 2016	11:00 a.m. - 11:45 a.m.	4301	AMS360-Account Manager	Renewal List Tool/My Expiring Policies	217A	ALL	ALL	Shed the paper and have your Renewal List in AMS360. As your day continues reviewing your Renewal List helps keep you on track and ahead of your renewals. Discuss how to use this tool daily and let go of that paper list we are all used to.	Susan Brunson, Herbie Wiles insurance Kathy Hodges, Dillion Insurance
Friday, March 04, 2016	11:30 a.m. - 12:00 p.m.	4302	AMS360-Admin	Licensing-Tracking/renewal	209	All	ALL	Tracking and renewing licenses can be a headache! Discuss Vertafore's AgencyEdge and ProducerEdge and talk with your peers regarding what works well for them. Come ready to discuss how we can all save time with compliance!	Denise Donohue, Scott Gillahan, Vertafore
Friday, March 04, 2016	11:00 a.m. - 11:30 a.m.	4303	AMS360-Accounting	Bank Reconciliation	214C	ALL	ALL	Ensuring your bank account is reconciled monthly is vital to your agency. See what checks haven't been cashed, make sure all accounting transactions have been processed, and record interest or bank charges. This session will cover it all!	Alisa Sutman, Field and Main Insurance
Friday, March 04, 2016	11:30 a.m. - 12:15 p.m.	4304	AMS360-Accounting	Vendor Payables vs Recurring Checks/EFTS	214C	ALL	ALL	The battle is on between Vendor Payables and Recurring Checks/EFTS! Learn the unique differences of both and why you might want to incorporate both in your agency.	Janet Tuttle, TDCU insurance Agency, LLC
Friday, March 04, 2016	11:45 a.m. - 12:15 p.m.	4305	AMS360-Account Manager	Renewal List Tool/My Expiring Policies Roundtable	217A	ALL	ALL	Discuss with your peers what you learned in Renewal List Tool & My Expiring Policies to take back to your agency to implement!	Susan Brunson, Herbie Wiles Insurance Kathy Hodges, Dillion Insurance
Friday, March 04, 2016	11:00 a.m. - 11:45 a.m.	4321	Sagitta-CL	eForms	214B	All	All	New Vertafore eForms, Classic eForms, editing new and classic eForms, NY Auto ID cards.	Kelly Bolton, Dowling & O'Neill Kim Greifzu, Bouchard Ins.
Friday, March 04, 2016	11:45 a.m. - 12:15 p.m.	4322	Sagitta-CL	Invoicing Tips & Tricks	214B	All	All	Tips & Tricks on invoicing including agency vs direct bill, installments, policy multi (bill-to, producers, transactions), premium financing, surplus lines and client receivables.	Carol Luebbehusen, Higginbotham Ins. Beth Jerould, Mesirov Ins.
Friday, March 04, 2016	11:00 a.m. - 11:30 a.m.	4323	Sagitta-PL	Invoicing Options	212	All	All	Agency Bill, Direct Bill options (invoicing, DB commission statement import, one step)	Tiny Clay, Bank of America Nancy Dennis-Ortiz, Advanced Ins.
Friday, March 04, 2016	11:30 a.m. - 12:15 p.m.	4324	Sagitta-PL	Personal Lines Roundtables	212	All	All	Rounds Tables or Open Forum for general discussion regarding Personal Lines.	Education Committee Members
Friday, March 04, 2016	11:00 a.m. - 11:30 a.m.	4325	Sagitta-Accounting	Interdivisional Processing	210A	All	All	Learn how interdivisional accounting can streamline your processes related to working in an organization with multiple regions, divisions, and departments. Have Sagitta do the work for you!	Amy Erickson, Regions Ins.
Friday, March 04, 2016	11:30 a.m. - 12:15 p.m.	4326	Sagitta-Accounting	Production Reporting	210A	All	All	We will look at some of the canned reports in Sagitta and also how you can build additional reports in report builder that are customized to your agencies needs.	Amy Erickson, Regions Ins. Sue Brown, Cool Insuring Agency, Inc.
Friday, March 04, 2016	11:00 a.m. - 11:35 a.m.	4327	Sagitta-Admin	Web Services	213B	All	All	How can you make your agency more efficient? Discuss and share with your peers by joining in this panel discussion on how web services can be used to automate daily tasks and discover what else can be achieved. Learn from those that have taken web services to the next level.	Jim Helton, Gulfshore Ins. Anthony Fox, Crichton Group Eric Wistrand, Couch Braunsdorf
Friday, March 04, 2016	11:35 a.m. - 12:15 p.m.	4328	Sagitta-Admin	Advanced Dictionaries	213B	All	All	Having difficulties extracting data from Sagitta? Learn from your peers and share your knowledge by joining in this panel discussion regarding Sagitta advanced dictionaries.	Tina Clay, Bank of America Todd Doster, MMBT

Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4331	BenefitPoint-Account Manager	Servicing the Client	214D	All	All	In this session, we will discuss how BenefitPoint can help Account Managers better service their Clients. The main topics for discussion revolve around how BenefitPoint can be used to track key Client milestones like Compliance and Renewals and how Activities can help Account Managers stay organized and set expectations for their Clients.	Chris Walters-USI Kristi Barnes, Wortham Sara Fish, CHS, Inc. Shelly Ma, ABD Brend Rineck, ABD Michelle Lewis, Vertafore
Friday, March 04, 2016	11:00 A.m. - 12:15 p.m.	4332	BenefitPoint-Accounting	RTM Reporting	217C	All	All	In this final Accounting track session, we will go through the different Business Intelligence (BBI) RTM reports, what they are, as well what they are designed to produce for the user.	Brett Kerfoot, Conner Strong & Buckelew Victoria Jackson, Marsh & McLennan Angela Minutaglio, Marsh & McLennan Hope Wood, Tompkins Laura Morales, Vertafore
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4333	BenefitPoint-New Agency	Post-Go Live	210B	All	New Agency	The works not done yet! During this last session we will discuss the roll-out process, ongoing data validation, reporting and the areas where continued communication touchpoints are needed though out. We will also discuss building a sustainable platform for users to access resources, training and provide feedback. Finally, the session will close with discussion around how to measure success, learning from mistakes made and how to continually evolve. The format of this session will incorporate presentation, team discussion and workgroup activity.	Vanessa Kinney, Hylant Crisanna Lin, Higginbotham Kelly Schleicher, Diebold Mindy Day, Vertafore
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4334	BenefitPoint-System Admin	Global Changes and User Communication	207B	All	Sys Admin	In this session you will learn the steps on how to move books of business and users using global changes. With this knowledge, Administrators will be able to efficiently switch blocks of business. Additionally, we will discuss and share best practices for communicating new enhancements, processes and permissions to users.	Craig McDonald, Arthur J. Gallagher Colleen Doherty, Eastern Benefits Tony Fronza, Conner Strong Buckelew Sheri Weaver, HNI Risk Services
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4341	AIM	Accounting-New Features & Major Improvements	211	All	Accounting	Come see what's new and improved in AIM Accounting! In this session, we will cover areas that have been enhanced in the most recent releases, including the new Help Menu, Security options, Email Statements, ACH/NACHA files, Print Statements, Offsets, Invoice Selections include Unapplied Payments, and Producer Payable Auto Selection on Direct Bill Insured.	Michelle Chubb, Vertafore
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4342	AIM	FinancePro-New Features and Major Improvements	213A	All	All	Vertafore has a renewed focus on the Premium Finance business and a new team dedicated to making FinancePro the best solution in the industry. Come see some of the new features that have been released in 2015 – and find out what is planned for 2016. Included will be a demonstration of our new notice types, our improved security access for General Agents, improved contact us email link with context, ability to add CSR and interested party names and emails during quote authorization, automated bank risk rating adjustment based on rules, and additional convenience fee options. We will also demonstrate the FinancePro integration with the Accuity Office of Foreign Assets Control (OFAC) checking service and discuss upcoming integrations and partnerships. We will go over FinancePro's suite of web services and discuss how FinancePro customers can create their own custom integrations or take advantage of our existing integrations with Vertafore MGA, MGU and Agency systems.	Eric Mathis, Vertafore
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4351	QQCatalyst	QQCatalyst Open Forum	208	All	All	Interactive session with Vertafore Product Manager	Dickinson Merrin, QQSolutions/Vertafore

Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4361	WorkSmart	WorkSmart Tips & Tricks	205	All	All	Want to be more efficient in ImageRight? Account Manager, Admin, Support or Owner - no matter your area, there should be a trick/tip (or two) in this session for you. Discover some of the best tricks and tips you've forgotten all about.	Kate O'Toole, Seubert Jessica Jeffress, Peel & Holland Deanna Emison, Stephens Insurance LLC Clint Rice, Vertafore
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4381	Young Professionals And Executive Leadership Combined Session	Talent Management-How To Find and Retain Top Talent Joint Session with YP	217B	All	AP-YP	How to find and retain top talent for your agency. Discussions topics include: internship programs, mentor programs, college job fairs, InVest, and non-traditional work arrangements such as distance workers, flexible work hours, process outsourcing.	Panel – Industry Experts and Successful Agency Representatives
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4391	Carrier-ImageRight	Integration With Your Core System (Guest Panel)	207A	ADV	CAR	Attend this session to gain insight from your peers in the industry on how they have built integrations with Claims System and ImageRight. Also learn how one of our clients have built custom tools to help troubleshoot problems when they occur	Vijay Muniswamy, Vertafore and guest speakers from The Main Street America Group
Friday, March 04, 2016	11:00 a.m. - 12:15 p.m.	4392	Carrier-Sircon	Driving Efficiency and Improving Agent Experience: New Sircon Product Features	218	All	CAR	Come hear about the latest Sircon innovations that are driving efficiencies, improving compliance, and making it easier than ever for carriers to connect with their distribution channel. Also learn how to get your product ideas and priorities to the Sircon team.	Dane Sprecher, Vertafore Tim Owen, Vertafore
Friday, March 04, 2016	2:15 p.m. - 3:00 p.m.	4401	AMS360-Account Manager	Submissions/ Endorsements/ Audits	217A	ALL	Commercial Lines	Whether you're quoting a new piece of business or remarketing an existing piece, Submissions can help you keep track of everything. Endorsements/Audits are part of every day as a CSR. Join this session to learn the best ways to process these in AMS360. Learn some cool tricks you haven't thought about.	Susan Brunson, Herbie Wiles Insurance Janet Threadgill, Carnal-Roberts Agency, Inc.
Friday, March 04, 2016	3:00 p.m. - 3:30 p.m.	4402	AMS360-Account Manager	Certs/EPI/ Cancellations	217A	ALL	Commercial Lines	Certificates are a common cause of E&O claims and can be very time consuming. Learn how to utilize AMS360 to protect your agency and save you time. This session will discuss renewing Certificates, creating new ones, distributing multiple Certificates, and more! Cancellations – A necessary evil, Cancellations are the last thing we want to deal with. Join this session to hear best practices and how you can save time with Cancellations.	Sarah Walls, Ragland, Strother, LaFitte Susan Brunson, Herbie Wiles Insurance
Friday, March 04, 2016	2:15 p.m. - 3:00 p.m.	4404	AMS360-Account Manager	Endorsements Roundtable- Processing in AMS360 vs Download	212	ALL	Personal Lines	Discuss the age old question, do you process endorsements in AMS360 or wait for the download? See the pros and cons for both, see how to process endorsements, and end with a roundtable discussing how your agency handles the process.	Kathy Hodges, Dillon Insurance Agency, Inc. Kate Foy, Foy insurance Group
Friday, March 04, 2016	3:00 p.m. - 3:45 p.m.	4405	AMS360-Account Manager	Renewals Roundtable- Sending Letters, Tracking & E&S	212	ALL	Personal Lines	Renewal letters? Re-quotes? Questionnaires? Auto-renewal? Learn from others how they handle Personal Lines renewals in their agency. Come away with ideas how to make the process easier while retaining more clients.	Kathy Hodges, Dillon Insurance Agency, Inc. Kate Foy, Foy insurance Group
Friday, March 04, 2016	2:15 p.m. - 3:15 p.m.	4406	AMS360-Accounting & Admin Combined Session	My Agency Reports (New Reporting Tool)	214C	ALL	Accounting & Admin	Learn about the new Vertafore reporting tool! This session will discuss the what reports are available, how you can manipulate them, and what else is coming with this new feature.	Andy Ley, Vertafore
Friday, March 04, 2016	3:15 p.m. - 3:45 p.m.	4407	AMS360-Accounting & Admin Combined Session	Target List/Campaigns	214C	ALL	Accounting & Admin	Automate your marketing or customer contact efforts with Target Lists and Campaigns. See how these features work together to better serve your clients and make you look good.	Venus Tondreau, Michigan Insurance Agency Angela Painter, Angela Adams Consulting
Friday, March 04, 2016	2:15 p.m. - 3:30 p.m.	4411	Vertafore Agency Platform	Platform Work Session	217D	All	All	Platform Work Session	Joyce Sigler, Jones-Wenner
Friday, March 04, 2016	2:15 p.m. - 2:35 p.m.	4421	Sagitta-CL	Certificate/EOP Management	214B	All	All	Managing certificate holders (import/export), group codes, assigning supplemental names, attachment forms, evidence of property.	Gretchen Hodge, USI Lucina DeWalt, Huntington Ins. Shannon Broughan, Propel Ins.
Friday, March 04, 2016	2:35 p.m. - 2:50 p.m.	4422	Sagitta-CL	Auditing	214B	All	All	Who conducts, how often, auditing Sagitta, ImageRight, reports.	Brad Booth, Sullivan-Curtis Kim Greifzu, Bouchard Ins.

Friday, March 04, 2016	2:50 p.m. - 3:10 p.m.	4423	Sagitta-CL	Proposals	214B	All	All	Proposals on large vs small commercial business, AMSWord proposal, carrier proposals, template design, schedules of insurance, renewal reviews, delivery of documents	Jenni Gamble, Higginbotham Ins. Tracey Weber, Huntington Ins.
Friday, March 04, 2016	3:10 p.m. - 3:30 p.m.	4424	Sagitta-CL	Claims	214B	All	All	Claims processing, complex claims, claims reporting, claim notes, client and carrier correspondence.	Kelly Bolton, Dowling & O'Neill Patti Robinson, AIA Liz Zybko, Haas & Wilkerson
Friday, March 04, 2016	2:15 p.m. - 3:00 p.m.	4425	Sagitta-Admin	Data Extraction	213B	All	All	Learn from this panel regarding extracting data from Sagitta, what tools to use and receive some tips and tricks. Bring your questions and share your knowledge with your peers.	Ray Sweetman, MMA Irina Gorzynski, MMA
Friday, March 04, 2016	3:00 p.m. - 3:30 p.m.	4426	Sagitta-Admin	System Security Measures	213B	All	All	How secure is your agency? Learn from this panel discussion on what measures they use to secure their systems.	Jim Helton, Gulfshore Ins. Ellen Dale, Lipscomb & Pitts Nick Ushio, Moreton & Company
Friday, March 04, 2016	2:15 p.m. - 2:45 p.m.	4427	Sagitta-Accounting	Financial Reporting	210A	All	All	In this session, we will look at the various financial reports in Sagitta, best practices around those reports, and options that may be available through 3rd party vendors.	Justin Murphy, Dowling & O'Neill Sue Brown, Cool Insuring Agency, Inc.
Friday, March 04, 2016	2:45 p.m. - 3:10 p.m.	4428	Sagitta-Accounting	Closing of Month-End/Year End	210A	All	All	Learn the in's and out's of closing out your accounting month and year end. We will discuss some of the tips and tricks to ensure you have a smooth close.	Rich Rawlings, Mesirow Ins.
Friday, March 04, 2016	3:10 p.m. - 3:30 p.m.	4429	Sagitta-Accounting	Auditing	210A	All	All	Learn from those who have come before you! We will discuss some of the typical requests that come in from both internal and external auditors and what reports will help you provide the necessary reports to satisfy those requests.	Brad Booth, Sullivan, Curtis Carol Dunbar, J. Smith Lanier
Friday, March 04, 2016	2:15 p.m. - 3:30 p.m.	4431	BenefitPoint-Account Manager	Reporting	214D	All	All	In this session, we will focus on the various ways reporting can be used from BenefitPoint. We will first have attendees consider what their ultimate goal is for using reports (i.e. auditing data, assisting with meeting scheduling, keeping organized, etc.). Then we will discuss some of the commonly used reports from BenefitPoint, when custom reports and subscriptions might be used and demonstrate how reports are generated. This session will be a combination of presentation, round table discussion and demonstration.	Chris Walters-USI Kristi Barnes, Wortham Sara Fish, CHS, Inc. Shelly Ma, ABD Brend Rineck, ABD Michelle Lewis, Vertafore
Friday, March 04, 2016	2:15 P.m. - 3:30 P.m.	4432	BenefitPoint-Accounting	RTM Roundtables	217C	All	All	In this open forum session, we will provide general topics to discuss then follow the direction dictated by attendees based upon questions/feedback received from the user.	Brett Kerfoot, Conner Strong & Buckelew Victoria Jackson, Marsh & McLennan Angela Minutaglio, Marsh & McLennan Hope Wood, Tompkins Laura Morales, Vertafore
Friday, March 04, 2016	2:15 p.m.- 3:30 p.m.	4441	AIM	Accounting Tips & Tricks	211	All	Accounting	Already an AIM Accounting user? Want more tips and tricks to make your job easier? We will dig deeper into the enhancements and major improvements as well as shortcuts and time savers in Accounting.	Michelle Chubb, Vertafore
Friday, March 04, 2016	2:15 p.m. - 3:30 p.m.	4461	WorkSmart	WorkSmart for the Account Manager	205	All	Account Manager	A Day in the Life of an Account Manager - What's your workflow from start to finish? Are you taking advantage of all the tools available to you? From Marketing to Stewardship and Policy Checking to Task Management, let some experts share their knowledge and best practices with you.	Crystal Leftenant, CBS Coverage Carol Dunbar, J. Smith Lanier Deanna Emison, Stephens Insurance LLC Clint Rice, Vertafore

Friday, March 04, 2016	2:15 p.m. - 3:30 p.m.	4481	Young Professionals And Executive Leadership Combined Session	Speaking of Generations-They Said What? Under 40s vs Over 40s In This Fun, Interactive Session Aimed at Finding Out What Both Groups Are Thinking Joint Session with YP	217B	All	AP-YP	Join this lively discussion with panelists from the Young Professionals and the non-so-young Executives as they explore the challenges facing agencies looking to grow thriving, successful firms in this unprecedented era of personnel change in our industry. We'll pose a set of questions to both groups about how a successful agency operates today and tomorrow, then compare notes. The result will be enlightening, and a little fun!	You Say...They Say Panel
Friday, March 04, 2016	2:15 p.m. - 3:30 p.m.	4491	Carrier-ImageRight	Building your ImageRight Workflows	206	ADV	CAR-AGCY	You will learn some tips from our experts on how to build workflows in ImageRight to effectively manage and track your business processes and measure performance against service levels	Chris Hartman, Vertafore Jason Pamplin, Vertafore
Friday, March 04, 2016	2:15 p.m. - 3:30 p.m.	4492	Carrier-Sircon	Product Design Working Group 1	218	All	CAR	Come sit with Sircon leadership and product experts to help shape the future of our solutions. Here, we will showcase our next-generation technology and give you a chance to have direct input in to the products we are building. This is a don't miss opportunity.	Dane Sprecher, Vertafore Tim Owen, Vertafore
Friday, March 04, 2016	2:15 p.m. - 3:30 p.m.	4493	Carrier-RefCon	Product Keynote: ReferenceConnect for Carriers	210B	All	CAR	The insurance industry is continually evolving and different opportunities and challenges demand different solutions. Join us and learn how ReferenceConnect and the upcoming scheduled new product features can improve internal efficiencies, expand access to competitive information and better connect to your agency force on commercial appetites. See why enhanced content look up tools, DOI carrier filings and a new way to aggregate and search for carriers and their commercial risk appetite profiling can enhance the way you approach these important processes to manage these opportunities and challenges within your market space.	Dave Acker, Vertafore Shirley Van Ginkel, Vertafore Ryan Smith, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5101	AMS360-Admin	WorkSmart Integration for AMS360 and Vertafore Agency Platform	209	All	All		TBD
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5102	AMS360-Accounting	Premium Fields and Classic Reports, Part 1	214C	All	ADV	There are a variety of premium fields. Learn how to use them and how that data flows to your reports. Discover the difference between manual input and download of premium. Gain tips to make the connection between customer service and accounting.	Alisa Sutman, Field and Main Insurance
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5111	Vertafore Agency Platform	Client Portal	217D	All	All-Platform and Non-Platform	Client Portal-this session is for all agencies using Client Portal	Joyce Sigler, Jones-Wenner
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5121	Sagitta	Integration with WorkSmart	214B	All	All	Learn how Sagitta and WorkSmart integrate together	Kate O'Toole, Seubert & Associates, Inc. Bill Henson, Vertafore Clint Rice, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5122	Sagitta	SurePath	208	All	All	Surepath	Gretchen Hodge, USI
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5131	BenefitPoint-System Admin	Broker Content Extract and Web Services	207B	All	Sys Admin	Learn about Broker Content Extract and Web Services	Enrique Gomez, Wortham Mitch Silver, Wortham Michelle Lewis, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5141	AIM	AIM Roadmap Open Discussion	211	All	MGA	Join this open forum for discussion about the future of AIM, including what is currently under development and needed updates and improvements. Bring your best ideas to share with the group.	Kella Teague, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5161	WorkSmart	WorkSmart Forms	205	All	All	Did you know there was a forms feature in WorkSmart? Do you know the ways it can be used? If not, join us for an in-depth look at what the forms feature can do, and the ways it can help you! We'll also look at how to create and maintain customized forms for your agency.	Jim Helton, Gulfshores Ins. Mary Ann Cepeda, Stephens Insurance LLC Chris Hartman, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5171	Young Professionals	Content Creation & SEO Best Practices	216	All	All	Content Creation & SEO – best practices for improving search optimization utilizing content creation techniques. Blogs, Video, Pinterest etc.	Chris Paradiso, Paradiso Insurance Agency

Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5181	Executive Leadership	Buying, Selling & Perpetuating Insurance Agencies-Part 1	217B			Are you planning to retire someday? When? Who are you going to sell your agency to? Or are you thinking about buying or merging with another agency? This three hour seminar will discuss your agency perpetuation options. Topics include: buying & selling agencies, mergers, shareholder agreements, methods of ownership transfer and the tax implications or the transaction	Jon Persky, CPA, CIC, PHR, Optimum Performance Solutions, LLC
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5191	Carrier-ImageRight	Web API Capabilities	207A	ADV	ALL	Could you be saving more time and money by optimizing your web services with Vertafore's new RESTful API? Be part of this deep-dive technical session that will be delivered by Vertafore's technology experts	Karyn Fowler, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5192	Carrier-Sircon	Essentials of Today's Regulatory Environment	218	All	All	Regulations are constantly changing, making staying in compliance more difficult than ever. In this session we will explore the latest regulatory updates including NARAB, adjuster, securities/annuity fiduciary rules, etc. We will also discuss future trends that will have regulatory impact.	Dane Sprecher, Vertafore Tim Owen, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5194	Carrier-Connectivity & Rating	Product Keynote-Rating	206	All	Carrier-Agency	What has your comparative rater done for you lately? In this session, you will learn about the latest innovations and advancements that have been made to the Vertafore rating products, including PL Rating, FSC Rater and QQSolutions. We'll also preview exciting new developments for 2016.	Dave Bevan, Vertafore
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	5195	Carrier-Connectivity & Rating	Product Keynote - TransactNOW	213B	Basic	All	Are you a carrier who wants more access to Vertafore agencies? Or are you an agency that wants easier connections with your carriers? In this session, you will learn about the agency and carrier benefits of TransactNOW, including recent developments and what's in the year to come. You'll also see how TransactNOW is being used to create and enhance innovative products that help streamline and grow your business.	Nellie Massoni, Vertafore
Saturday, March 05, 2016	9:30 a.m.-10:20 a.m.	5201	AMS360-Admin	Doc360 Setups	209	All	All	Setting up and customizing Doc360 setups, including Document types, restrictions, Activity types, using them in your office properly	Whitney Malone, Gardiner Allen DeRoberts Insurance
Saturday, March 05, 2016	9:30 a.m.-10:20 a.m.	5202	AMS360-Accounting	Premium Fields and Classic Reports, Part 2	214C	All	ADV	There are a variety of premium fields. Learn how to use them and how that data flows to your reports. Discover the difference between manual input and download of premium. Gain tips to make the connection between customer service and accounting.	Alisa Sutman, Field and Main Insurance
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5211	Vertafore Agency Platform	Reference Connect and DocuSign	217D	All	All-Platform and Non-Platform	Reference Connect and DocuSign	Joyce Sigler, Jones-Wenner
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5221	Sagitta	Executive Dashboard	214B	All	All	Learn about Executive Dashboard	Joe Rukas, Conner Strong & Buckelew Bruce Westman, Vertafore Andy Ley, Vertafore
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5231	BenefitPoint-System Admin	RFP and Q&A Library	207B	All	Sys Admin	Learn about RFP and Q&A Library	Laura Morales, Vertafore Mindy Day, Vertafore
Saturday, March 05, 2016	9:30 a.m.-10:20 a.m.	5241	AIM	PERS How-To Demo and Discussion	211	All	AIM/ImageRight/WorkSmart	Product improvements are an important part of building a system that meets the ever-changing customer needs. The Product Enhancement Request System (PERS) is being expanded to cover more of the Vertafore portfolio to include AIM and ImageRight products. In this session, we will discuss how the process works from submitting a PERS request, voting on submitted requests, and how the committee will work with Vertafore Product Management to make recommendations on product enhancements for future releases. Come be a part of the process, and find out how you can help improve product offerings.	Keila Teague, Vertafore Jeremy Fowler, RT Speciality Lynn Bove, CBS Coverage

Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5261	WorkSmart	Thinking about WorkSmart?	205	All	All	Join us for a very interactive session to find out the things you need to know to help you decide if WorkSmart is right for you and your office. We'll discuss all of the things you need to consider as you plan, then address where to begin once you have it. What things should you concentrate on first? Where do you go after that? We'll answer all of these questions and more!	Jessica Jeffress, Peel & Holland Kevin Dickmann, Tolman & Wiker Insurance Services Patty McQuade, Moody Insurance Agency, Inc. Clint Rice, Vertafore
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5271	Young Professionals	Marketing and Branding Roundtable, Part 1	216	All	All	Marketing/Branding Round Table – Bring your best marketing, advertising, community involvement and social ideas to share with the group. Find out what other agents are doing well to promote their agency and their brand.	Roundtable
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5281	Executive Leadership	Buying, Selling & Perpetuating Insurance Agencies-Part 2	217B			Are you planning to retire someday? When? Who are you going to sell your agency to? Or are you thinking about buying or merging with another agency? This three hour seminar will discuss your agency perpetuation options. Topics include: buying & selling agencies, mergers, shareholder agreements, methods of ownership transfer and the tax implications of the transaction	Jon Persky, CPA, CIC, PHR, Optimum Performance Solutions, LLC
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5291	Carrier-ImageRight	Design Session	214A	ALL	All	Come spend some time with our product team and experience design (XD) team to help shape the future of our solutions. This will give you a chance to have direct input into the experience we are building within our solutions	Andrea Burgess, Vertafore Karyn Fowler, Vertafore Vijay Muniswamy, Vertafore
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5292	Carrier-Sircon	Product Design Working Group 2	218	All	Agency	Come sit with Sircon leadership and product experts to help shape the future of our solutions. Here, we will showcase our next-generation technology and give you a chance to have direct input in to the products we are building. This is a don't miss opportunity.	Dane Sprecher, Vertafore Tim Owen, Vertafore
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5293	Carrier-RefCon	Product Keynote-RefCon for Agencies	210B	All	Agency	Join this session to see and hear about the newest functions of ReferenceConnect straight from the experts! You'll learn the latest on updates, future enhancements and what to expect down the road. This session will do a deep dive on the highlights shared during a brief presentation during the Friday Day In the Life Agency Management System sessions.	Dave Acker, Vertafore Shirley Van Ginkel, Vertafore Ryan Smith, Vertafore
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5294	Carrier-Connectivity & Rating	Personal Lines Trends	217C	All	Carrier-Agency	Want to find out what's really happening in the IA channel for personal lines? Attend this session and learn more about who is shopping, what they're buying, and how we're seeing things change over time.	Monica McCool, Vertafore
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	5295	Carrier-Connectivity & Rating	Vertafore and Guidewire Partnership	213B	Basic	CAR-MGA	Vertafore and Guidewire announced our partnership in 2014. Come learn what the partnership entails, both in its initial phases as well as the vision for the future. There will also be an open discussion of other ways we can help our mutual customers.	Nellie Massoni, Vertafore
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5301	AMS360-Admin	Renewal List Tool	209	All	All	Creating renewal lists, distributing and assigning	Susan Brunson, Herbie Wiles insurance Kathy Hodges, Dillion Insurance
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5302	AMS360-Accounting	Month-End/Year-End Best Practices, Part 1	214C	All	ADV	Come ready to finally get your arms around best practices for accounting monthly and yearly process. Learn procedures to verify your balance sheet receivable and payable accounts. Discover reports that assist in identifying errors in invoicing, proper use of recurring journal entries and expense allocations - all steps necessary to ensure your AMS360 reports truly reflect your financial state. Understand the year-end closing entry processes and teh budget system built into AMS360.	Alisa Sutman, Field and Main Insurance
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5311	Vertafore Agency Platform	Connectivity	217D	All	All-Platform and Non-Platform	Connectivity, including Download, TransactNOW, Edocs and Claims Download	Joyce Sigler, Jones-Wenner
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5321	Sagitta	3rd Party Reporting	214B	All	All	Learn about 3rd Party Reporting	Zach Schulte, Bowen Miclette & Britt Todd Doster, MHB, Inc.

Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5331	BenefitPoint-System Admin	Integration with AMS360 and Sagitta	207B	All	AMS360 and Sagitta Users	Learn about BenefitPoint integration with AMS360 and Sagitta	Michelle Lewis, Vertafore
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5361	WorkSmart	Email Receivers	205	All	All	Whether you are curious about additional uses for Email Receivers or haven't yet implemented them in your agency, this session is perfect for you! Join us as we discuss the benefits of email receivers, examples of how they can be put to use in your agency, and, even better, how to set them up.	Jim Helton, Gulfshores Ins. Carol Dunbar, J. Smith Lanier Chris Hartman, Vertafore
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5371	Young Professionals	Marketing and Branding Roundtable, Part 2	216	All	All	Marketing/Branding Round Table – Bring your best marketing, advertising, community involvement and social ideas to share with the group. Find out what other agents are doing well to promote their agency and their brand.	Roundtable
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5381	Executive Leadership	Buying, Selling & Perpetuating Insurance Agencies-Part 3	217B			Are you planning to retire someday? When? Who are you going to sell your agency to? Or are you thinking about buying or merging with another agency? This three hour seminar will discuss your agency perpetuation options. Topics include: buying & selling agencies, mergers, shareholder agreements, methods of ownership transfer and the tax implications or the transaction	Jon Persky, CPA, CIC, PHR, Optimum Performance Solutions, LLC
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5391	Carrier-ImageRight	ImageRight & Sircon Integration	214A	All	CAR	In this session, you will learn about integration concepts with Sircon and ImageRight. Effectively manage content & workflows related to producer lifecycle management	Patrick Masi, Vertafore Ricky Lopez, Vertafore Vijay Muniswamy, Vertafore
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5392	Carrier-RefCon	Product Keynote-RefCon for MGAs	210B	All	MGA	Learn how ReferenceConnect can extend your organization's marketing presence with ReferenceConnect. With over 3,00 agencies, and 90 of the top 100 US Brokers performing over 6M searches per month, see how you can get access to this community of the top producing commercial agencies in the country.	Dave Acker, Vertafore Shirley Van Ginkel, Vertafore Ryan Smith, Vertafore
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	5393	Carrier-Connectivity & Rating	Download Product Keynote	206	Basic	CAR	Come learn about the improvements to download that we've done since our conference last year. Topics will include our certification process, general download enhancements, Claims Download, Activity Notes Download, etc., as well as the tools that we can offer carriers / MGAs to ensure they have the best of breed download for our mutual agents.	Nellie Massoni, Vertafore
Saturday, March 05, 2016	11:30 a.m. - 12:20 p.m.	5401	AMS360-Admin	Security Group Setups	209	All	All	Understanding how to change access for different employees based on what areas they should have access to	TBD
Saturday, March 05, 2016	11:30 a.m. - 12:20 p.m.	5402	AMS360-Accounting	Month-End/Year-End Best Practices, Part 2	214C	All	ADV	Come ready to finally get your arms around best practices for accounting monthly and yearly process. Learn procedures to verify your balance sheet receivable and payable accounts. Discover reports that assist in identifying errors in invoicing, proper use of recurring journal entries and expense allocations - all steps necessary to ensure your AMS360 reports truly reflect your financial state. Understand the year-end closing entry processes and teh budget system built into AMS360.	Alisa Sutman, Field and Main Insurance
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5411	Vertafore Agency Platform	AgencyEdge and ProducerEdge	217D	All	All-Platform and Non-Platform	Sircon products AgencyEdge and ProducerEdge. See how they work together to manage agency and individual licenses	Joyce Sigler, Jones-Wenner
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5421	Sagitta	AM Best Import	214B	All	All	Learn about AM Best Import	Stephanie Proctor, BB&T Insurance Services, Inc. Bruce Westman, Vertafore Bill Henson, Vertafore
Saturday, March 05, 2016	11:30 a.m. - 12:20 p.m.	5431	BenefitPoint-Accounting	Excel Techniques	207B	All	All System Types	Learn Excel Skills valuable to anyone working with data - NOT LIMITED TO BENEFITPOINT DATA SETS	Gary Bossert, MMIC Agency Craig McDonald, AJ Gallagher

Saturday, March 05, 2016	11:30 a.m. - 12:20 p.m.	5441	AIM	Vertafore PolicyIssurance Roadmap & Product Direction	211	All	CAR/MGA	Vertafore's PolicyIssurance solution helps you process policies in hours, not days. Its rules based engine automatically selects the relevant forms based on the ACORD standard XML data, and populates the policy without the need to rekey information. In this session, we will discuss the current product direction, but we want to hear from you! Come and talk about how we can adjust to your growing needs.	Keila Teague, Vertafore
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5461	WorkSmart	Renewal Imports	205	All	All	Want to create tasks for renewing policies automatically for your account managers? Come learn about Renewal Task Imports. We'll talk about the who, what, where, when and how. Also learn the reasons why Renewal Task Imports can be so vital to your agency.	Jim Helton, Gulfshores Ins. Jessica Jeffress, Peel & Holland Deanna Emison, Stephens Insurance LLC Clint Rice, Vertafore
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5471	Young Professionals	Time Management and Productivity Tips & Tricks	216	All	All	Figured out how to manufacture time? Trick question – no one has! Join panelists and other attendees to explore the latest tools and techniques to make the most of the time that you DO have. .	Mike Foy and Others TBA
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5481	Executive Leadership	Service That Sells: Frontline to Bottomline	217B	All	All	In this session we'll address the most common areas where agents make mistakes with clients: Creating a TRUST environment: Training, Respect, Understanding, Support, Teamwork Transition to relationships - building client partnerships What clients want - understanding the buyers' mindset	Emily Huling, Selling Strategies, Inc.
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5482	Executive Leadership	Social Media and Your Agency How to use it to grow your business and solidify your client relationships	214A	All	All	Join this How-To session to get tips on: Social Media for beginners to advance Digital marketing with an agency on-boarding process for a great client experience How to have a profitable website Your agency brand is your ROI in your marketing	Chris Paradiso, Paradiso Insurance Kelly Donahue-Piro, Agency Performance Partners
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5491	Carrier-ImageRight	Integration with AIM	207A	All	MGA	In this session, you will learn about the improved AIM-ImageRight integration we are currently working on and all the future possibilities	Deb Ward, Vertafore Neville Allen, Vertafore
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5492	Carrier-Connectivity & Rating	Book Roll/Book Roll Analytics and Renewal Analytics	213B	Basic	All	Learn about the product that will help agents retain their customers, and help carriers do more targeted book rolls. Come see how we've added the ability to rate the renewals/book rolls as well, using your existing rates!	Nellie Massoni, Vertafore
Saturday, March 05, 2016	11:30 a.m. - 12:20 a.m.	5493	Carrier-RefCon	Accelerate Your Agency's Commercial Lines Growth Using ReferenceConnect	210B	All	Agency	Not sure how to ramp up your staff and new producers quickly to drive new sales? Finding that you're searching all over the place for basic information like forms, coverage checklists, and recommended coverage? Wish there was one place where you can get the information you need to speed up the sales process and win new business? In this session, you will learn how ReferenceConnect can help you.	Dave Acker, Vertafore Shirley Van Ginkel, Vertafore Ryan Smith, Vertafore
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5501	AMS360-Admin	Alerts	209	All	All	Setting up and using Alerts in your agency	Alisa Sutman-Field and Main Insurance Venus Tondreau-Lake Michigan Insurance Agency
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5511	Vertafore Agency Platform	Vertafore Single Sign On (VSSO) and My Agency Reports	217D	All	All-Platform and Non-Platform	Vertafore Single Sign On (VSSO) My Agency Reports	Joyce Sigler, Jones-Wenner
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5521	Sagitta	Vertafore eForms	214B	All	All	Learn about Vertafore eForms	Kim Griefzu, Bouchard Insurance Ellie Boleski, Vertafore Bruce Westman, Vertafore

Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5541	AIM	Vertafore PolicyIssurance-Preparing For and Implementing a New Forms Library	211	All	CAR/MGA	Vertafore's PolicyIssurance solution helps you process policies in hours, not days. Its rules based engine automatically selects the relevant forms based on the ACORD standard XML data, and populates the policy without the need to rekey information. In this session, we will discuss the library implementation process, including how you can start preparing today for implementation tomorrow. We will also cover best practices in implementation and onboarding for carriers and agents. This session is relevant for anyone who is eager to find out how to move from your current system to a more flexible and robust policy issuance solution.	Keila Teague, Vertafore
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5561	WorkSmart	BPR, Part 1	205	All	All	You've heard of BPR, but you really aren't sure what it can do for you. Or, maybe you've looked at it, but it just seems overwhelming. Join us in this session to learn what it does and where to begin. We'll talk about all the things you should watch out for when trying to run reports and get the information you need about your business. We'll end the session with time for you to ask questions about specific reports for your agency.	Patty McQuade, Moody Insurance Agency, Inc. Deb Ward, Vertafore
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5571	Young Professionals	Tech Apps Demo Open House, Part 1	216	All	All	Stop in for quick 10-15 minute hands-on demonstrations of various tech applications you can utilize for your agency – like Google Hangouts, Mail Chimp, Drip marketing programs, and more	TBA
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5581	Executive Leadership	Crushing It: How Automated Agency Marketing Will Transform Your Agency	217B			Learn how automating the insurance marketing and sales cycle through the use of technology will help your agency maximize organic and paid lead generation efforts. In addition to new sale acquisition, discover how an integrated marketing system can give your agency an advantage through the deployment of hands free personal engagement, cross-sell, retention, and win-back campaigns. Presented by Laird Rixford a leading authority on how technology will transform the agency of tomorrow.	Laird Rixford, ITC
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5582	Executive Leadership	Leading and Managing In A Dramatically Changing World	214A	All	All	Leadership has changed from the simplicity of "lead by example", "set clear expectations", "have a clear vision", and other models that allowed non-diverse environments to succeed. Today we have rapidly changing technology, large generational differences, diversity, desired diversity, exit planning for employees and owners, and numerous other emerging issues to address. This session will address these items and many more items we must understand if we are going to lead and manage through the 21st century.	Larry Linne, Incite Performance Group
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5591	Carrier-ImageRight	Migration and Consolidation - Get all your documents and workflows to the latest version of ImageRight	207A	ADV	CAR-MGA	Do you have multiple ImageRight instances? Are you on the 3.5 version of ImageRight? Do you have documents and workflow in other systems? Come learn how Vertafore can help to move all of your documents and workflows into a single system to reduce IT cost and standardize business processes.	Jason Pamplin, Vertafore
Saturday, March 05, 2016	2:45 p.m. - 3:35 p.m.	5592	Carrier-RefCon	Leverage ReferencConnect to Train new staff	210B	All	Agency	Having trouble getting your new millenials up to speed on insurance products, information and sales techniques. Learn from Joyce Sigler how ReferenceConnect can help you build customized training and education programs for your employees to ramp up individual and team productivity.	Dave Acker, Vertafore Shirley Van Ginkel, Vertafore Ryan Smith, Vertafore Joyce Sigler, Jones-Wenner Ins.
Saturday, March 05, 2016	3:45 p.m. - 4:35 p.m.	5611	Vertafore Agency Platform	QuickNavs and WorkQ	217D	All	Platform	QuickNavs and WorkQ	Joyce Sigler, Jones-Wenner
Saturday, March 05, 2016	3:45 p.m. - 4:35 p.m.	5621	Sagitta	Sagitta Education Open Forum-Wrap Up	214B	All	All	Join this session lead by your Education Team. Hear plans for the future, and give your feedback on NetVU2016.	Sagitta Education committee

Saturday, March 05, 2016	3:45 p.m. - 4:35 p.m.	5661	WorkSmart	BPR, Part 2	205	All	All	Part 2: You've heard of BPR, but you really aren't sure what it can do for you. Or, maybe you've looked at it, but it just seems overwhelming. Join us in this session to learn what it does and where to begin. We'll talk about all the things you should watch out for when trying to run reports and get the information you need about your business. We'll end the session with time for you to ask questions about specific reports for your agency.	Patty McQuade, Moody Insurance Agency, Inc. Deb Ward, Vertafore
Saturday, March 05, 2016	3:45 p.m. - 4:35 p.m.	5671	Young Professionals	Tech Apps Demo Open House, Part 2	216	All	All	Stop in for quick 10-15 minute hands-on demonstrations of various tech applications you can utilize for your agency – like Google Hangouts, Mail Chimp, Drip marketing programs, and more	TBA
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	51A1	Vertafore Speed Rounds Session 1	Choose from 9 products and hear about the latest and greatest innovations from product managers in this new speed round session	212	All	All	Pick your top 5 solutions in this new product speed round session. Hosted by Vertafore Product Managers, you'll be able to choose from these nine new products coming to markets in 2016: Vertafore Analytics Client Portal Marketing Automation Executive Dashboard Vertafore Mobile & Texting Vertafore Agency Platform My Agency Reports SalesTrack Desktop as a Service (DaaS) Each table will have a new product and you'll be presented with 10 minutes of insights, features, capabilities, and benefits before rotating to the next product.	Vertafore Product Managers
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	51B1	Other	Liberty Mutual Automation Capabilities	210A	All	All	Join Liberty Mutual to learn about key automation capabilities to help your agency be more efficient.	Regina Felts, Liberty Mutual
Saturday, March 05, 2016	8:30 a.m. - 9:20 a.m.	51B2	Other	Creating Repeatable Success	210B	All	All	How do you create repeatable success? How do you take what you do best and replicate it throughout the agency? How do you grow while maintaining quality? In this session you'll learn 3 "must-do's" to creating repeatable success. You'll receive tips used by other successful agencies. And, you'll receive a free Roadmap to Success SM .	Rebecca L. Koos, PeopleInsure
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	52A1	Vertafore Speed Rounds Session 2	Choose from 9 products and hear about the latest and greatest innovations from product managers in this new speed round session	212	All	All	Pick your top 5 solutions in this new product speed round session. Hosted by Vertafore Product Managers, you'll be able to choose from these nine new products coming to markets in 2016: Vertafore Analytics Client Portal Marketing Automation Executive Dashboard Vertafore Mobile & Texting Vertafore Agency Platform My Agency Reports SalesTrack Desktop as a Service (DaaS) Each table will have a new product and you'll be presented with 10 minutes of insights, features, capabilities, and benefits before rotating to the next product.	Vertafore Product Managers
Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	52B1	Other	Focus and Grit to Reach Your Sales Goals in 2016	214D			If you didn't sell in today's market multiple you must have the focus and grit to reach your organic growth goals. In the session, we will draw on key areas to help achieve your validated organic growth. The idea would be to turn a mountain into a mole hill. We will discuss key characteristics that you will need to build or enhance an organic growth machine.	Justin Berry, FIRST Insurance Funding Corp.

Saturday, March 05, 2016	9:30 a.m. - 10:20 a.m.	52B2	Other	Making Sense Of Mobil For Your Agency	210A			Learn how mobile's ability to engage and contain both customers and prospects is what makes mobile a critical component of your agency's digital marketing strategy. Is your agency properly utilizing mobile with clients & prospects? How much is it costing your agency to not engage in a meaningful way on the mobile platform? Winning prospects is expensive, keeping customers is profitable. But how does your agency do that? After attending this session your agency will understand how to engage & contain clients and prospects on the mobile platform, and why it's so important to do so.	Matt Arron, Insurance Agent Mobile App
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	53A1	Vertafore Speed Rounds Session 3	Choose from 9 products and hear about the latest and greatest innovations from product managers in this new speed round session	212	All	All	Pick your top 5 solutions in this new product speed round session. Hosted by Vertafore Product Managers, you'll be able to choose from these nine new products coming to markets in 2016: Vertafore Analytics Client Portal Marketing Automation Executive Dashboard Vertafore Mobile & Texting Vertafore Agency Platform My Agency Reports SalesTrack Desktop as a Service (DaaS) Each table will have a new product and you'll be presented with 10 minutes of insights, features, capabilities, and benefits before rotating to the next product.	Vertafore Product Managers
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	53B1	Other	Steve Anderson-Productivity Checkup	214D			Join Steve to discuss business issues that impact technology ROI. Hear about current industry initiatives and technology trends that are driving strategic decision making for agencies of all sizes.	Steve Anderson, Authority on Insurance Technology, Productivity and Profitability
Saturday, March 05, 2016	10:30 a.m. - 11:20 a.m.	53B2	Other	The Art of Hiring Smart	210A			Hiring is both one of the most difficult, yet most important tasks a manager or business owner will face. We've all hired someone who did great in their interview, only to have their evil twin appear just a short time later. Employee selection is one of the most difficult, yet most important tasks a manager or business owner will face. We've all been there...gone with our "gut" and hired someone who dressed fittingly for their interview, answered all the questions correctly, and seemed to have all the right skills listed on their resume. So how is it that only a short time later, their evil twin appeared on the job, rather than that all-star employee you thought you hired? The continued growth and success of your organization depends on making smart choices and hiring the best. The Art of Hiring Smart will give you confidence and a plan for hiring and recruiting success and reduce your chances of employee turnover.	Carletta Clyatt, Omnia Group
Saturday, March 05, 2016	11:30 a.m. - 12:20 p.m.	54B1	Other	Get the Whole story on Property	212			Helping Independent Agents Compete and Evolve in the Property market. Who says data can't enable profitability and still be fun? Join Jerry Fox for this informational session to hear more about reconstruction cost data and where it comes from, the importance of accurate Insurance to Value (ITV) and possible legal and bottom-line ramifications of getting it wrong. There are some new time savers and you'll also walk away knowing how to address your customers concerns about reconstruction cost versus market value versus assessed value.	Jerry Fox, CoreLogic Insurance Solutions
Saturday, March 05, 2016	11:30 a.m. - 12:20 p.m.	54B2	Other	There Is A Better Way	210A			Learn the critical success factors that agencies must do well when implementing change	Angela Adams, Angela Adams Consulting