The SmartOffice Success Plan for Signator Reps

Working together to achieve results!

Now that you have purchased SmartOffice, do you have a plan in place to maximize its potential in your office?

Maybe you purchased SmartOffice to increase production, improve office efficiency, step-up client communication, manage leads more effectively, or improve collaboration between your staff members. Whatever the need, SmartOffice can deliver!

For over 30 years we have been helping customers achieve success through the effective use of our application suite. Through this experience, we have learned that while every firm has its own unique business model, the highest performing firms have applied most, if not all, of the best practices outlined in this document.

The **Success Plan Action Items** that follow are the 6 most important things you should incorporate right away to ensure you lay a solid foundation upon which to grow your business with SmartOffice.

Also included in this guide is a list of **Helpful Resources** that you should keep handy and refer to frequently as you begin to use SmartOffice.

Finally, we have provided and easy to follow **Getting Started Checklist** to plot your SmartOffice course and help track your progress

Read on to see how you can get started on the road to success today!

Success Plan Action Items

Set Goals

Goals are the building blocks of the success plan and are what will be used to guide all implementation and training efforts.

SmartOffice is a means to an end and not the end itself, so the single most important thing you can do *right now* is identify 3 to 5 (or more if you're ambitious!) production, service, and/or back office goals. Whenever possible, goals should be quantifiable so you can measure your success.

We like to say that technology follows business and not the other way around. Keep the focus on your business and the functionality will follow.

Appoint a SmartOffice Go-To Person

This should be a staff member who has a good grasp of technology and has a vested interest in the success of SmartOffice. This person will help configure SmartOffice, create users and assign the appropriate rights, assist in coordinating training efforts, and act as the control point for support issues.

Assess Your Data

Data entered into SmartOffice whether from a conversion, import, sync, or manual process can wind up being inconsistent, incomplete, or redundant. Your data does not need to be perfect, but clean data leads to better adoption, more accurate reporting, and more efficient record identification and analysis.

The old adage “Garbage in – Garbage out” comes to mind. Taking steps to ensure that information is added accurately and consistently to the database will pay off in the long run.

If your database is yet to be populated with data and there is a source database that will be used for this purpose, conduct data cleanup efforts in the source data prior to bringing it into SmartOffice.

Ensure Your Equipment is Ready

Keep workstations up-to-date with the appropriate software and service packs to ensure successful operation of all programs, including SmartOffice. Items that should be installed and/or run on each workstation include:

- Anti-Virus software (e.g., McAfee, Norton)
- Anti-Spyware (e.g., Spybot Search and Destroy)
- Pop-up blockers (correctly configured)
- Latest Microsoft Windows and Office service packs
- Optimization programs (e.g., CCleaner)
- Internet cache clearing run on a regular basis (e.g., weekly)
- Avoid bleeding edge hardware and software. It takes most software companies several months to develop and test for anything new.

Commit to Ongoing Training

Rome was not built in a day. Those who have been most successful with SmartOffice have adopted a phased approach to their learning.

Allocate time for training on a regular basis whether it be individualized or in a group setting. This can be achieved by:

- Ensuring existing and new staff members attend our free training classes (discussed later).
- Making SmartOffice an agenda item in staff meetings.
- Sponsoring SmartOffice “lunch and learns” where staff members conduct SmartOffice training in their area of expertise.
- Setting aside an hour at the beginning or end of the day every two weeks to allow staff members to view the latest Fast Class and practice the concepts presented (if appropriate).
- Scheduling web-based or on-site training facilitated by one of Ebix’s SmartOffice experts.

Provide Leadership

Change can be difficult for some people and software adoption efforts are often derailed by staff members who are averse to changing the way they currently operate. It is essential that you lead by example and make SmartOffice a priority for you and your business.

You play a pivotal role in the successful adoption of SmartOffice , so make it a point to clearly articulate the expectations you have for the software and for each staff member and/or department.

By doing this and offering a collaborative environment in which ideas can be shared and solutions discussed you will dramatically increase your chances of success.

(626) 585-3505 • Fax (800) 779-3123

Helpful Resources

SmartOffice Sign-in Page: https://jhfn.ebix.com/index.htm

Mobile access (SmartOffice Anywhere):
https://jhfn.ebix.com/soanywhere/pages/other/login.htm

Free Training Classes

We offer a series of free, instructor-led, web-based classes designed to deliver core, building block SmartOffice knowledge, best practices and strategies to turn your data into dollars. Attend these classes as soon as possible!

- SmartOffice Overview
- Beyond the Basics
- Office Settings and Administration
- Introduction to Dynamic Reports
- Introduction to SmartInvestments

Class schedule and registration: **Training Class Registration**

If the link does not work, copy and paste this URL in your browser: http://www.ez-data.com/support/training_calendar.php

Getting Started Help

The topics below address many common questions users have as they begin to use SmartOffice. Click on each item to learn more.

- **Running SmartAnalyzer**
- **Signing In to SmartOffice**
- **Adding SmartOffice to Your Browser's Bookmarks**
- **Signing Out of SmartOffice**
- **General Navigation**
- **Creating Letters (Correspondence)**
- **Posting E-mail Messages to Outlook**
- **Sending Messages to Other Users in the Office**
- **Setting User Preferences**

URL: http://help-prod.ez-data.com/sopro/Help/getting_started.htm

Ebix Technical Support

Technical support is available from 8:00am – 8:00pm ET Monday through Thursday and 8:00am – 4:30pm ET on Fridays.

855-ASK-EBIX (855-275-3249)

Signator Investors, Inc.®
powered by John Hancock Financial Network

Contact Information:

John Nusslein
617-572-4095
jnusslein@jhancock.com

Email Technical Support

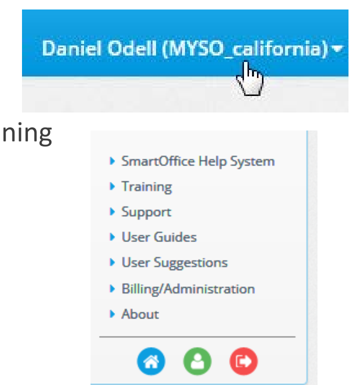
Non-urgent issues may be emailed to our support team and a response will be received within 24 business hours.

SmartOfficeSupport@ebix.com

Online Help and Training

There is a large collection of **help** and **training** information available from within SmartOffice.

Simply click your name / office name in the top right corner of the screen and a list of help and training resources displays. Select the desired option.



Social Media

Click on any of the icons below to keep up-to-date on SmartOffice and Ebix news.

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Getting Started Checklist

- [ ] **Attend the SmartOffice Overview course**

Attend this training session before you first sign in to SmartOffice to ensure that you have enough base knowledge to navigate to the calendar, search for contacts, view policy and investment information, and access additional training resources.

Register Now! Click Here

If the button above does not work, copy and paste this URL in your browser: *http://www.ez-data.com/support/training_calendar.php*

- [ ] **Attend the Office Settings and Administration class**

This class is designed to help administrators ensure that SmartOffice is properly configured to meet their company's unique business requirements (e.g., creating users, assigning licenses, establishing security, etc.).

Register Now! Click Here

- [ ] **Configure your SmartOffice office**

Ensure the appropriate restrictions (if any) are applied to control data visibility. Create all users and assign user rights.

- [ ] **Review your Book of Business**

Your contact and inforce policy data will be loaded by John Nusslein in the Signator home office. Ensure the data is loaded before proceeding to avoid obstacles moving forward.

- [ ] **Attend the Beyond the Basics class**

This class demonstrates a realistic workflow using basic concepts such as adding contacts, notes, and activities. Client communication, activity creation, and activity follow-up using the activity outcome wizard are emphasized.

Register Now! Click Here

Learn how to work with policy data

- Business Logic and Workflow
- Searching for Policies
- Viewing and Managing Policies
- Creating and Deleting Policies
- Merging Policies
- Life Policy Calculations
- Premium Values and Rounding
- Other Policy Management Features

Sync SmartOffice with Outlook Contacts and Activities

Complete a one-time setup to automatically begin real-time syncing of your contact, calendar, tasks, and email messages across Outlook, your mobile devices and SmartOffice—all through the cloud.

How to:

- https://www.youtube.com/watch?v=DPpU2gnt914
- http://www.financialcomputer.com/exchange-sync/

Sign up:

- https://exchangesync.fcasp.com/sologin.php

Attend the Introduction to SmartInvestments class

Attend this training session before you begin using the SmartInvestments module and/or the data downloading features of the module. This session covers topics such as the Security Master and account setup, position/holding tracking, and reporting.

Learn how to work with Investment data

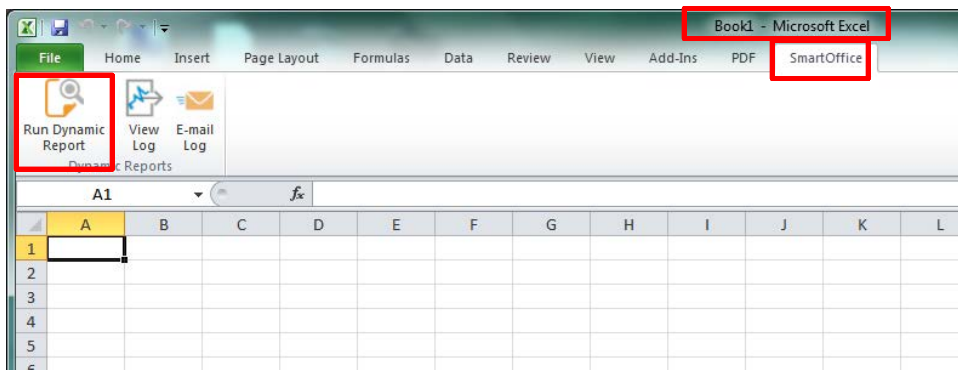
- Working with Investment Accounts
- Working with Investment Positions
- Working with Investment Securities
- Asset Allocation
- Performance Calculations
- Investment Validation
- Investment Alerts
- Reports

Attend the Introduction to Dynamic Reports class

In this session you will learn how to create useful dynamic reports designed to help you manage your client base and uncover new opportunities. You will also learn how to display these reports right on the homepage or have them emailed to you directly.

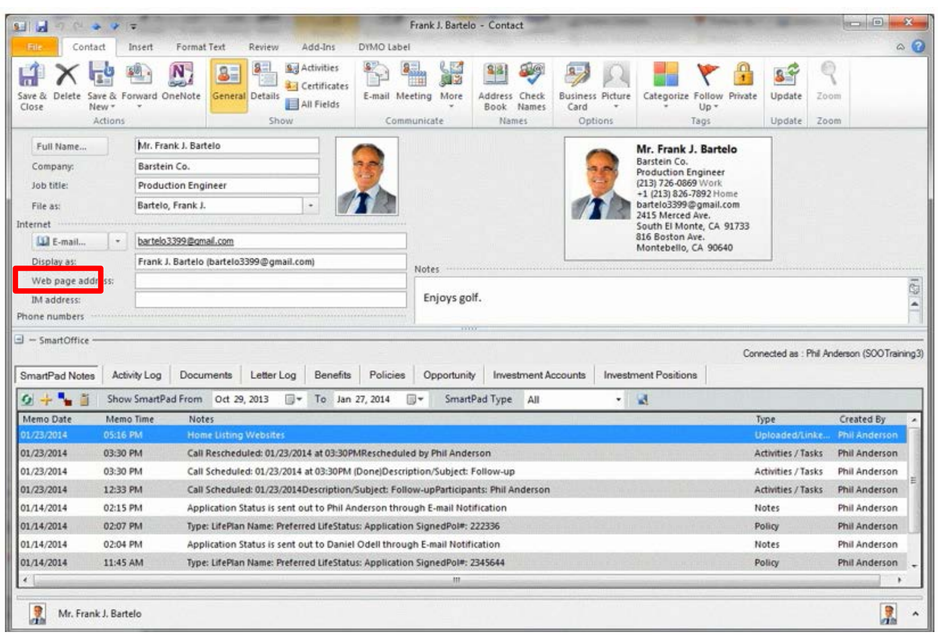
Run a SmartOffice report directly from Excel

How to: http://help-prod.ez-data.com/sodi/help/en/index.htm#excel_report_plug-in.htm



Access SmartOffice data from Outlook

How to: http://help-prod.ez-data.com/movies/office_plugin_flash/office_plugin.html



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Configure your dashboards

Dashboards allow you to organize and view key business information quickly and easily.

As a Signator rep, you have access to pre-defined dashboards that will be loaded automatically in your SmartOffice office; however, you can create additional dashboards, if desired.

How to: http://help-prod.ez-data.com/sopro/Help/home_page_and_dashboards.htm

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Connect SmartOffice with Laser App

SmartLink for Laser App makes it possible to export data from SmartOffice into the Laser App form-filling software, dramatically reducing the amount of time needed to populate forms with client data.

How to: http://help-prod.ez-data.com/sopro/Help/smartlink_for_laser_app.htm

Fast Class:http://help-prod.ez-data.com/fastclasses/SO7_v217LaserApp/laser_app_flash/laser_app.html

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Create financial plans with eMoney

SmartLink for eMoney makes it possible to export data from SmartOffice to the eMoney financial planning software. This integration enables the user to save time when creating financial plans with client data in eMoney.

How to: http://help-prod.ez-data.com/sopro/Help/smartlink_for_emoney_-_introduction.htm

Fast Class: http://help-prod.ez-data.com/movies/emoney_flash/emoney.html

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Establish a link between SmartOffice and Docupace

SmartLink for Docupace it possible to open a client's Docupace folder directly from that client's SmartOffice contact or investment account record.

How to: http://help-prod.ez-data.com/sopro/Help/docupace_single_sign-on_(sso).htm

❑ **Attend Signator SponsoredTraining**

Signator will be presenting a series of training classes geared toward ensuring you get the most out of your SmartOffice investments.

Sign up:

Custom Training and Consulting Options

Our team of seasoned trainers has helped thousands of customers get the most out of their SmartOffice investment and they can do the same for you!

We train with a purpose and build training programs to meet your goals and unique requirements.

Getting Started Package

$500

The Getting Started training package works equally well as a follow-up to our free training classes or as the first training session for an office.

Objective:

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

What's Included:

- Introductory "getting to know you" call to gain insight into your unique business structure and goals.
- Two 90-minute sessions focusing on 3 keys areas of SmartOffice:
  - **Contact/Data management**
    - Customizing Data Views
    - Maintaining data consistency for a healthier database
    - Segmenting contacts for marketing and sales efforts
    - Tracking referral business
    - Creating households and establishing key relationships
    - Using custom fields and screens to track important information
  - **Calendar/Activity Management**
    - Setting individual preferences for viewing tasks activities, entering activity data, and completing activities
    - Creating activities and tasks
    - Attaching Documentation to calendar entries
    - Posting calendar entries to maintain compliance
    - Using the activity outcome feature to document next steps
    - Syncing options for calendar activity (Microsoft Exchange users)
  - **Dynamic Reporting**
    - Displaying report information right on your homepage
    - Automatically emailing dynamic reports inside and outside your organization
    - Automating reporting
    - Creating tasks and correspondence from report output
  - **Q&A time**

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Taking SmartOffice to the Next Level

$600

SmartOffice is a robust solution that contains a lot of features—many of which you will never use. That's right you will never use all of the features that SmartOffice has nor should you try. What's important is that you use those feature and functions that help you meet your goals and objectives.

Let us help you take your SmartOffice experience to the next level by designing and implementing workflows and processes that yield real results.

Note: Mastery of the concepts covered in the Getting Started with SmartOffice package is essential prior to enrolling in this session. Classes are hands on and will be conducted in your "live" office.

Objective

Obtain tangible results through streamlined workflows, new and/or improved customer outreach initiatives, and/or enhanced management tools delivered via "dialed-in to your business" dashboards. We will put SmartOffice to work for you in this session!

What's Included

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

Suggested content could include:

- **Contact/Data Management**
  - Birthday/Age reports created and placed in a dashboard:
    - Birthdays Current Month/Next Month
    - Age 59 ½
    - Age 70 ½
    - Birthdays in 6 Months from Current Month
  - "Sharing" reports within office to all or select individuals
- **Calendaring Management**
  - Calendar reports will be created and placed in a dashboard
    - Current week's activities/tasks sorted by participant & status (Done vs. Active)
    - Current month's activities/tasks sorted by type (with goal attached)
    - Current year's appointments/calls sorted by contact (clients with goal attached)
- **Overview**
  - Opportunity module
  - Policy module