



FSC Manager April Newsletter

Coming Soon

Version 7.0

Version 7.0 was released to beta agencies in March. It will be released to all agencies in April. Your agency will receive an email notifying you when it is time to update.

Version 7.1

Another update is planned for the Summer of 2007. These are the tentative plans for that update:

- » Update auto and home ACORD forms
- » Implement an automatic follow-up system from download
- » Add a "lead" field and a "business type" field on the client screen
- » Add a Service Link Report to track number of inquiries done at your agency

Carrier Downloads

We are working to certify auto and home download for Mercury Insurance. We are also working with EMC on certifying umbrella download. We will notify agencies when these become available.

Resource Group Meeting Dates

Resource Groups are management system user groups that meet twice a year (Spring and Fall) in a regional location. The purpose of the meetings is to educate users on existing and new features as well as share ideas with other agencies on how to maximize the use of their management system software.

To join a user group, please visit our website,

<http://www.mi-assistant.com/miassistant/resource+groups/default.asp>. Locate the group that is closest to your agency and contact a Resource Group officer to receive more information. Upcoming Resource Group meeting dates are as follows:

Western Iowa: Tuesday, April 3, 2007
Eastern Iowa: Wednesday, April 4, 2007
Southern Wisconsin: Tuesday, April 17, 2007
Illinois: Wednesday, April 18, 2007
Western Wisconsin: Wednesday, April 25, 2007
Eastern Wisconsin: Thursday, April 26, 2007
Southern Minnesota: Wednesday, May 2, 2007
Northern Minnesota: Thursday, May 3, 2007

An online Resource Group meeting is being considered; if you are interested please email resourcegroups@fiserv.com.

Communication

Paperless

The Wisconsin PIA recently held a meeting on becoming paperless with approximately 90 people in attendance. This indicates that there are still a lot of agencies who have not made the jump to becoming paperless, but are certainly considering it. Here are some of the reasons why agencies want to become paperless:

- » Paper files are sometimes filed incorrectly
- » Paper files are out at people's desk
- » Paper files get large and unmanageable and take office staff time to clean up
- » Paper files take up space. Many agencies have store rooms full of paper
- » Agencies sometimes have multiple offices and need access to customer files from other locations
- » Scanners are more affordable and the quality is much improved
- » You can put security on your data
- » You can back up your data for disaster planning

Here are some things you should consider when implementing a paperless office:

- » Make sure that you have sufficient hard drive space on your server
- » Determine what type of scanning process your office will implement
 - Front Office – documents are scanned and distributed to individuals in the office to link to customer files
 - Middle Office – documents are distributed to individuals in the office who will scan at their own desk and link to customer files
 - Back Office – documents are distributed to individuals who process the paper then give to someone to scan at the end of the day and then are attached to the customer file
- » Depending on your scanning process, determine how many scanners and what quality of scanner your agency needs
- » Backup, Backup, Backup. Because all files are stored on a computer, a reliable backup system is absolutely necessary
- » Consider implementing dual monitors to make viewing documents side by side with company web sites, or agency management system easier
- » Decide what pieces of paper actually need to be scanned. Don't save things you don't really need to
- » Prepare your staff. Have someone in your office practice scanning and attaching, work out the processes, and then train the rest of the staff

Your agency management system is already equipped to allow you to either attach images directly to client files or link to a date file (similar to T-filing). There is no additional up front or monthly maintenance cost to implement this feature. If you need help or have questions with this process, please call FSC Tech Support for assistance.

Service Link

Many agencies are now utilizing real time inquiry and seeing the benefit for their agency. Top agencies are averaging 20 or more real time transactions per day. If your agency has not been set up with Service Link, please contact support at 800.401.2895 to schedule a setup appointment.

In version 7.1, we will be adding a report that allows your agency to see how many inquiries are being made through Service Link per day with break downs by carrier and user. We are also working on adding Grinnell to Service Link. We will notify agencies when this becomes available.