



Take the 21 Day Challenge!

Everyone in the agency forms new habits.

Use it with existing staff as well as new employees.

Get started today!

Some experts claim it takes 21 days to form a habit—and break old habits.

In the spirit of encouraging independent agents to form new habits and gain new efficiencies, the Real Time/Download Campaign is asking you to adopt new workflows to leverage real-time technology tools for sales and customer service. The “21 Day Challenge” will ease anxiety over workflow changes. How? By incrementally changing the way the staff does business—and having some fun in the process!

Real Time is the ability to click on a button from a client file in the agency management system or comparative rater for immediate access to carrier information on that client. This approach provides a single workflow for servicing or quoting.

Here’s a step-by-step guide for taking the 21 Day Agency Challenge:



Week One: Days 1 to 5

Plan and Set Up

1. The principal or someone in a leadership position should organize a meeting and advise employees of the Agency Real Time Challenge on which you are about to embark. Discuss the benefits of Real Time in your agency. (Want some more information? (<http://www.getrealtime.org/active/RealTimeGuide.asp>).
2. Designate a team leader to oversee the project.
3. Review the Real Time Implementation Guide (<http://www.getrealtime.org/active/RealTimeGuide.asp>).
4. The team leader should visit the Real Time Implementation pages for your agency management system vendor (<http://www.getrealtime.org/active/vendor.asp>)
 - Locate and click on your vendor.
 - Obtain the vendor's carrier list that identifies transaction types by carriers—or point them to:

Applied Systems

- Implementation Document: <http://us.appliedsystems.com/downloads/Installguide.pdf>
- Carrier List:
Personal Lines: <http://us.appliedsystems.com/downloads/realtimerefguidepl.pdf>
Commercial Lines: <http://us.appliedsystems.com/downloads/realtimerefguidecl.pdf>

Ebix

- Implementation Document: (must log in with User ID & Password)
- Carrier List: http://www.ebixasp.com/ebixaspHelp/RTI_Carrier_list_4-09.pdf

FSC Manager

- Implementation Document: <http://www.mi-assistant.com/resources/servicelinkinstructionanduserguide.pdf>
- Carrier List: <http://www.mi-assistant.com/resources/carrierinterfaces1.pdf>

SIS (Strategic Insurance Software)

- Implementation Document: Contact Vendor
- Carrier List: <http://www.sisware.com/files/CertsStatusDownload.pdf>

Vertafore (Formerly AMS Services)

- Implementation Document: <http://www.ams-support.com/transactnow/transactnowmanual.pdf>
- Carrier List: http://www.amsservices.com/downloads.cfm?files_category_id=86

(For other agency management systems, contact your vendor)

5. The team leader should make sure employees are set up with user codes and passwords within your management system for the lead carriers and transactions that are available. Make sure these passwords are kept up to date in the management system on a continuous basis. Establish an agency procedure for managing passwords.
6. Start simple. Teach employees how to run billing, claims inquiry, and policy inquiry transactions you have activated for Real Time. Establish an agency workflow and procedures regarding inquiry transactions.
7. Have employees use Real Time with these carriers every day for all inquiry transactions--get them comfortable with the new workflow.
8. On the agency's intranet, post carriers and their available Real Time transactions. If your agency doesn't use an intranet, be sure to communicate the updated information in some fashion.
9. Find out how to run Real Time reporting function and set up in the system. Require the monitoring transaction to help identify any training issues during the 21 Day Challenge contest. The reporting transactions will confirm usage of Real Time within the system by user.
10. Now you're ready to register your agency for the Challenge. Click this link <http://www.zoomerang.com/Survey/?p=WEB229CVXB5TBL>



Week Two: Days 6 – 10

Inquiry Transactions

1. Set up additional carriers and run billing, claims, and policy inquiry transactions with them.
2. Have employees use Real Time for all available carriers every day for all inquiry transactions that they need to run.
3. Monitor employees for their usage. Touch base with employees and see how it is going and if they are seeing benefits and/or running into any issues. Resolve any issues—now they should be more comfortable.
4. Team leader should set up carriers for endorsement bridge and rating/quoting transactions for your staff. (For additional information on these transactions, visit <http://www.getrealtime.org/active/RealTimeGuide.asp>.)
5. Establish agency workflows and procedures regarding these transactions.



Week Three: Days 11 – 15

Rating/Quoting & Endorsement Transactions

1. Team leader holds staff training for Real Time rating/quoting or have employees attend Real Time rating webinars sponsored by your user groups, vendor management system, or carriers to learn more about the functionality and tips and tricks to enhance your experience.
2. Team leader creates contest to continue inspiring usage during the home stretch of week four (e.g. free lunch, gas cards, early Friday afternoon leave, etc.). Contest ideas:
 - a. Most Real Time usage by an individual.
 - b. Entire agency using 85% of the time.
 - c. Entire agency using 100% of the time.
 - d. Staff uses Real Time transactions to remarket accounts.
 - e. Staff uses Real Time to rate/quote new business.
3. Continue to monitor employees for their usage. Touch base with employees and see how it is going and if they are seeing benefits and/or running into any issues. Resolve any issues.
4. Check back with your vendor and carriers to see what functionalities have been added.



Week Four: Days 16 - 20

Real Time: Inquiry, Endorsement & Rate/Quote Transactions

1. Have staff use Real Time for all available carriers every day for all transactions that are available.
2. Implement contest during last week of 21 Day Challenge to help users continue using Real Time into the home stretch.
3. Continue to monitor employees for usage; touch base with employees and see how it is going and if they are seeing benefits and/or running into any issues; resolve any issues.
4. Bring the group together to demonstrate—in numbers or dollar amounts—the efficiencies the office is gaining.



Day 21

Congratulations! Your agency has successfully used Real Time for 21 days. Has it been a positive experience? [Click here for your certificate of completion.](#)

Successful completion of the **21 Day Real Time Challenge** occurs when:

- Real Time has become the predominant workflow for my agency (for those carriers and transactions where it is offered); and
- This new workflow is having a positive impact in our agency.

Please return to the 21 Day Challenge homepage at <http://www.zoomerang.com/Survey/survey-intro.zgi?p=WEB229BW3PJCS3>. Log your success, and tell us about your experience.

For carrier and vendor news and updates on the Real Time Campaign, visit www.getrealtime.org.