



Join the Movement: The 21 Day *Champions Challenge*

*One employee or department in the agency goes first—
educating and leading the way for others later.
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 Champions Challenge:



Week One: Days 1 to 5

Set Up & Inquiry Transactions

1. Decide if a single employee or a group of employees will take on the Champions Challenge—organize a meeting if necessary to discuss.
2. Review the Real Time Implementation Guide: (<http://www.getrealtime.org/active/RealTimeGuide.asp>).
3. Visit the Real Time Implementation pages for your agency management system vendor: (<http://www.getrealtime.org/active/vendor.asp>).
 - Locate and click on your management system 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.)

4. Make sure you are set up with user codes and passwords within your management system for the carriers and transactions that are available.
5. Run billing, claims, and policy inquiry transactions for the carriers you have activated for Real Time in your management system.
6. Use Real Time with these carriers every day for all inquiry transactions—get comfortable with the new workflow.



Week Two: Days 6 – 10

Inquiry Transactions

1. Set up additional carriers and run billing, claims, and policy inquiry transactions with them.
2. Use Real Time for all available carriers every day for all inquiry transactions you need to access for servicing.



Week Three: Days 11 – 15

Rating/Quoting & Endorsement Transactions

1. Set up carriers for endorsement bridge and rating/quoting transactions and begin using the transactions.
2. Attend Real Time rating/quoting 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.
3. Rate new business and accounts that need to be remarketed within your management system using Real Time workflows.
4. Continue using Real Time transactions every day for all transactions you need to run. Check back with your vendor and carriers to see if new functionality has been added.



Week Three: Days 11 – 15

1. Use Real Time for all available carriers every day for all transactions that are available transactions you need to run—are you encountering any issues? Feel like a pro?
2. Introduce the rest of the staff to Real Time—show them the new habits you've acquired in the last three weeks that are making it easier to function as an independent agent working in a multi-carrier environment. Motivate and encourage employees to take their own Challenge.
[Click here for a step-by-step guide on the 21 Day Agency Challenge.](#)
3. Get staff set up with carrier user codes and passwords so they can begin using Real Time inquiry transaction at their workstations.
4. Monitor your progress. Provide feedback to user groups, vendors, and carriers regarding the functionality.



Day 21

Congratulations! You are successfully using Real Time!

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.

As we discussed above, are you ready to roll this out agency wide?
[Click here for a step-by-step guide on the 21 Day Agency Challenge.](#)

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