

Save Time & Increase Profits with Real Time!

Presented by the all industry
Real Time/Download Campaign



Jeff Yates
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Agents Council for
Technology,
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Agents & Brokers of
America

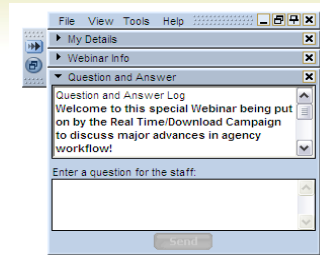
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- Use your Question & Answer Log to ask a question

- A recorded version of the webinar will be available at www.getrealtime.org at the “Real Time webinars” quick link

- You will receive a follow up email with panelists’ contact information



Cal Durland
Director of Member
Relations &
AUGIE facilitator

ACORD

cdurland@acord.org



Cyndy Smith

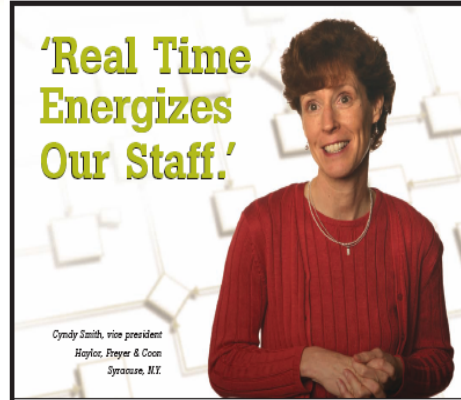
Agent & Real Time Campaign
Co-Chair

Haylor, Freyer & Coon
Syracuse, NY

200 employees, 10 locations
70% CL, 20% PL, 10% Benefits

Sagitta Agency Management
System
Vertafore Personal Lines Rating

csmith@haylor.com



Karen Youngman

Agent and Campaign Co-
Chair

Don Allen Agency
Rochester, NY

35 users, 2 offices
50-50 CL & PL

Applied TAM 10.6
PL Manager

kyoungman@donallagencey.com



John Heinsz

Agent – Campaign

Participant

Heinsz-Schaefer-Garwitz

Insurance Services

St. Charles, Missouri

10 Users

75% PL, 20% CL, 5% L&H

SIS Partner XE System

Quomation Personal Lines

Rating

john@hsgr.com



Today's Agenda

- How agents are using Real Time and Download
- Real Time Demos & Discussion of Agency Benefits
- Agency research confirms growth of Real Time
- How Real Time will evolve & get even better
- Web Site Resources for taking next steps



Panel: Real Time & Download— Some of the Basics

- What is Real Time & how are using it in your agency?
- What's new with Download & how does it fit with Real Time?
- How are using your Real Time tool to improve the management of carrier passwords?
- How did you get all of your employees onboard with Real Time?



Real Time Demos & Agency Benefits

- John Heinsz: Inquiries & Endorsements (SIS System)
- Karen Youngman: Commercial Lines Multiple Carrier "Round Trip" Quoting (Applied Systems)
- Cyndy Smith: Personal Lines Multiple Carrier "Round Trip" Quoting (Vertafore PL Rating)



Research Confirms Growth in Real Time

- 66% of agencies using Real Time to some extent for inquiries and servicing
- 57% for personal lines quoting
- 21% for commercial lines quoting
- Over 200 carriers now offering at least some Real Time
- 57% of PL RT users have inquiries/service available from at least 4 carriers;
50% CL users from at least 4 carriers



Research Confirms Time Savings & Benefits of Real Time

- Average daily time savings for PL RT user: 60 minutes
- Average daily time savings for CL RT user: 43 minutes
- Major benefits by frequency of mention: saving keystrokes, responding faster to client questions, able to quote faster, freeing up staff time for service & sales and enhancing accuracy of data



Research Confirms Growth of Download

- CL Download grew 14% in 2010 to 49,363 agent-carrier pairs
- PL Download also continues to grow at 170,000 communicating pairs



Panel: How Real Time will continue to evolve & get even better

- Carriers will offer a more consistent experience in terms of transactions and lines of businesses offered
- RT tool will be leveraged so that password management becomes easier for agents
- Carriers will reduce frequency of RT transactions erroring out by making assumptions when needed
- Inquiry transactions will provide links so agents can perform any related servicing transactions
- Endorsement bridges will “deep link” directly to carrier change page where agent can complete the endorsement.



Your next stop: System Specific Resources

- Applied Systems: <http://us.appliedsystems.com/>, login, click on "webinars" under "Quick Links"; and at "Systems" tab, "carrier interface", then "real time capabilities"
- Vertafore: <http://www.vertafore.com/sitecore/content/transactnow>, for "Live" Webinars. <http://vertafore.learn.com> at "TransactNOW" for recorded webinars
- SIS: <http://training.partnerxe.com/>, login, click on topic
- Other vendors: <http://www.getrealtime.org/active/vendor.asp>



Online Industry Real Time Resources

- Real Time Campaign site: www.getrealtime.org
- RT 21 Day Challenge Site: www.getrealtime.org/21dc
- "Eddie's" blog: <http://eddiesays.org/>



Welcome to GetRealTime.org - Windows Internet Explorer
 http://www.getrealttime.org/active/default.asp

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How to Get Real Time Now!

1 Download The Implementation Guide
 2 Visit The Real Time Implementation Pages For Your Vendor
 3 Go Real Time

Take the 21 Day Challenge

UPCOMING WEBINAR: REGISTER NOW!

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What is Real Time?
 "Real time is the ability to click on a button from a client file in your agency management system or comparative raster for immediate access to carrier information on that client. The transaction may be a quote, billing inquiry, claim inquiry/loss runs, policy view, endorsements or a request for information. This approach provides a single workflow for servicing or quoting."

Testimonials
On Real Time:
 "Real time saves our agency time and energy. We have information at our fingertips with fewer keystrokes, which assists in providing faster customer service tailored to each customer's needs. Real time saves steps in our workflows, eliminates backlog and results in more sales."
Angela Decker of United Insurance Agency, Bay Saint Louis, Miss.

Real Time Inquiry
 Number of Carriers Offering

1 item remaining) Waiting for http://www.getrealttime.org/active/default.asp...

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Real Time 21 Day Challenge!

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. [Real Time](#)

Real Time 21 Day Challenge
 getrealttime.org/RealTime-21DayChallenge

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The 21 Day Challenge offers something for everybody!
 Get Started Today!

New to Real Time | **Champions Challenge** | **Agency Challenge**

Internet 100%

http://eddiesays.org/

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Eddie Says

Let's talk Real Time and Download
Providing a single, consistent, multi-carrier workflow, saving agents and brokers time and money

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Resources

MetLife Auto & Home Leverages 21 Day Challenge

Posted on August 31, 2010 by eddiesays

Earlier this year, the Real TimeDownload [Campaign](#) launched the 21 Day Real Time Challenge. The goal: to help agencies organize their implementation of Real Time and to make agency-wide habits of using the functionality. A number took the challenge. But it wasn't just agencies that benefited.


[MetLife Auto & Home](#) ran with the Challenge and ended up getting more agencies to use Real Time. But they found the initiative to be a good opportunity to rally staff awareness and involvement, as well.

Read about the carrier's experiences in a short case study available on the GetRealTime.org Web site. You can open a [EQE](#) of the article or visit the "Articles and Case Studies" page and click on Carrier Leverages 21 Day Challenge as Catalyst.


Does your company have a success it would like to share with others? Or are you an agent or broker with a positive carrier Real Time experience? If so, [email us](#) or post a comment below.

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