



TORONTO APPLIED SYSTEMS CLIENT NETWORK

FULL DAY SESSION
(COST \$50.00 PER PERSON)

Thursday October 12, 2006 - 8:30 AM to 3:30 PM

Weston Golf & Country Club
50 St. Philip's Road, Toronto

AGENDA

8:30 – 9:00 Registration and Coffee

9:00 – 11:00 Applied Systems Presentation

- **Corporate overview, including an update on the Canadian operations**
Tom Carruth, EVP, Implementation & Support Services
- **Product direction and TAM 8.0 Feature Presentation**
David DeGroot, Product Manager, Agency Products

11:00 – 11:30 Applied Systems Q&A

- Do you have a question for Applied?
- Ever wish you could address an issue to someone other than a support tech?

Complete the question section on the registration form and return it no later than October 2, 2006. All submitted questions will be provided to Applied Systems for investigation and research so that an answer can be provided to you at the session.

11:30 – 12:30 Lunch

12:30 – 1:20 Roundtable Discussion

1:20 – 1:30 Break

1:30 – 2:20 Roundtable Discussion

2:20 – 2:30 Break

2:30 – 3:20 Roundtable Discussion

Roundtables

Each of the roundtables will include a Broker “expert” to guide the discussion, We STRONGLY encourage you to bring your specific office questions to the table to get advice on how to resolve the issue. Take advantage of this Broker to Broker opportunity to find solutions to your problems or seek advice. A general description for each topic is attached to be used as a guideline only.

Directions to Weston Golf Club:

- exit Highway 401 east or westbound at Weston Road (first exit west of Hwy 400)
- go south on Weston Road
- keep to the right, turning onto St. Phillip's just after going under the railway overpass
- the entrance to Weston Golf Club is on the right about 100 feet after crossing the bridge
- follow the signs and park at the back of the building

Roundtable Discussion Topics with Description

1. Advanced Creation of Formletters and Proposals using If Statements and Ask Variables

If you're saying to yourself "If what?" or "Ask who?", you really need to sit at this table. The TAM / Word integration

2. Technical Issues - Including Version 8

Discussion will revolve around the following hardware and software issues that have been identified as being an issue with Brokers: Holistic Overview of Network Management- OS & TAM patching best practices, firewall best practices, anti-virus strategies, and content/spam management. The table will not be limited to these items, so bring your own specific issues.

3. Imaging

Still trying to imagine a paperless environment for your office? Don't know how to get started? In the middle of the process and having problems? There are several alternatives that can be used depending on your office structure.

4. Developing & Auditing Workflows

Are you struggling to develop or update your workflows to work with today's technology? Would you like to compare your workflows for efficiency?

Once you have trained your people with your Broker-specific workflows. Now how do you know that they are being followed? You've standardized the coding and written procedures and everyone is following them....right? How do you audit to ensure that the database accurately reflects what is actually happening in your office? Some suggestions will be offered.

5. Accounting / Month-End (including month-end reports) / Balancing Receivables

Having problems with the numbers? Unable to balance your receivables to your Status of Accounts? Didn't know you had to? Bring your questions to the table for specific guidance.

6. Managing Information with Reports

What information would you like to get from your database that you are not currently getting? How do you get information if there is no standard report available? Discussion will include downloading to excel, extra criteria, and user defined reports.

7. Interface/WARP Issues

Does your office use WARP are you encountering issues with it? Do you not use WARP because of an issue? What are the methods you use to interface with your companies? Wondering if there is a better way to get client policies from insurance companies' websites? A member of ASCnets Interface Committee will field your issues and discuss possible solutions.

8. Commercial Business Solutions (TAM, Policyworks, Certificate Exchange)

How do other Brokers manage their commercial business information in TAM? Or do they? Can TAM be utilized or is Policyworks a better alternative for your office? Is using a third party online software for certificate issuance an option? Bring your problems to find the solution that works the best for you.

9. Marketing Strategies and Tools

Are you utilizing TAM to help you get more business? Do you send letters to your monoline accounts and setup activities for follow-up? Discuss how TAM can help you with your marketing strategies.

Don't see something on the list that you were hoping to? Let us know. If there are enough requests, we can add an additional table, or at least point you in a direction where you can find some help.

Each participant will have the opportunity to visit 3 roundtable discussions. Please circle each participant's choice below. There will be a cost of \$50 per person.

Please return this response form via FAX to SANDRA BENNETT @ 416-292-7436 by Oct 2nd.

Brokerage: _____

Phone Number: _____

Total Cost: \$ _____ Please make cheque payable to TASCnet and forward to:
Denise Ruddy, HKMB International Insurance Brokers
595 Bay Street, Suite 900, Box 81, Toronto, ON M5G 2E3

Participant 1 Name: _____			
Formletters and Proposals	1	2	3
Technical Issues	1	2	3
Imaging	1	2	3
Developing & Auditing Workflows	1	2	3
Accounting/Month-End	1	2	3
Managing Information with Reports	1	2	3
Interface/Warp Issues	1	2	3
Commercial Business Solutions	1	2	3
Marketing Strategies and Tools	1	2	3

Participant 2 Name: _____			
Formletters and Proposals	1	2	3
Technical Issues	1	2	3
Imaging	1	2	3
Developing & Auditing Workflows	1	2	3
Accounting/Month-End	1	2	3
Managing Information with Reports	1	2	3
Interface/Warp Issues	1	2	3
Commercial Business Solutions	1	2	3
Marketing Strategies and Tools	1	2	3

Please Note: There is no limit to the number of participants from one office. Should you wish to send more than 2 participants please complete additional forms.

Question for Applied Systems: _____

