



Group Benefits CRM TRAINING

Power Time Training Philosophy

Our goal in every Power Time training class is that our students will find it the most useful training they have ever taken. Every class should make your job easier and more productive.

Power Time training for Group Benefits CRM (GBC) is customized to your particular needs and team capabilities. The following outline is a starting point, but topics can be expanded or eliminated and groups can be divided to focus on topics of interest to their functional responsibilities. Sessions are short so you learn more and lay a solid foundation on which to build your knowledge.

Power Time ... Mastering time through the power of technology

In the intensity of today's competition, relationships are the key to success. But building relationships takes time. Power Time's focus is on making machines do the tedious, repetitive work they do best so you have more time for the things you are in business to do.

Available GBC Classes

Power Time offers GBC Power Start, Advanced GBC User, GBC Administrator classes and hourly specialized training.

GBC Classes are scheduled for your company. Power Start is 4 hours. Other classes are 6-hours. All classes are divided into no more than 2-hour segments. Classes may be held online, at your site, or in Power Time's Training Center. Tuition is \$149/user for Power Start and \$249/user for other classes, with a three-student minimum. Hourly or individual training is \$125/hour. Classes are scheduled upon Power Time's receipt of your tuition.

GBC POWER START

Keep and share data on leads, clients, carriers, and policies in one easy to use place

The Basics

- GBC Screens and Tabs*
- Outlook vs. Web Interfaces*
- GBC Entities and Relationships*
 - Clients
 - Contacts
 - Leads
 - Members
 - Vendors
 - Policies
 - Plan Details
 - Renewals
 - Opportunities
 - Issues
 - Marketing Campaigns
 - Seminars
 - Commissions
 - Activities
 - Communications

Navigating through GBC
Finding what you need

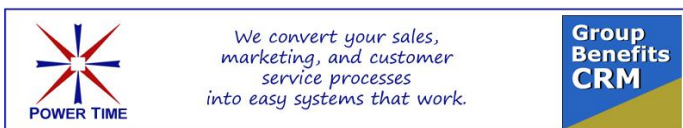
Starting Your Day

- Checking what's scheduled*
- Checking Renewing Policies*
- What are your Open Issues?*
- Making your morning calls*
- Taking notes*
- Sending and tracking emails*
- Attaching documents to policies*
- Scheduling callbacks, todo's, and meetings*

After Your Networking Lunch

- Adding and editing accounts, contacts, policies, issues, and more*
- Using and Creating Views*
- The Excel Interface*
- Built-in Reports*

Review and Q&A





ADVANCED USER TRAINING

A Quick Review of the Basics

USING GBC TOOLS:

Scheduling Tips and Tricks

- Managing your Calendar*
- Scheduling Multiple Contacts*
- Scheduling for Others*

Advanced Correspondence

- Creating Word Templates*
- Sending Mass Mailings*

Emailing

- Creating Email Templates*
- Integrating Outlook and GBC*
- Sending Bulk Emails*
- Linking email back to GBC*

Document Management

- Attaching a document*
- Viewing attached documents*
- File attachments*

Views and Queries

- More System Views*
- Creating your own queries*
- Showing the information you need*
- Sharing Views*
- Using Views*

Reports

- Exporting Views to Excel*
- QuickPrint*
- More GBC Reports*
- Create Your Own with the Report Wizard*

Exporting Records

THE SALES PROCESS:

- Leads*
- Converting Leads to Client Organizations, Contacts, and Opportunities*
- New Business Opportunities*
- Managing the Opportunity Pipeline*
- Converting an Opportunity to a Policy*
- Policy Management*

MANAGING RENEWALS:

- 3-Month View*
- Creating Renewal Opportunities*
- Developing an RFP Process Using GBC Proposals*
- Finalizing the Opportunity*
- Creating your Renewed Policy*
- Reporting during the process*

ISSUE MANAGEMENT:

- Creating Issue Records*
- Managing Issues*
- Stewardship Reports*

MEMBERSHIP MANAGEMENT:

- Members vs. Contacts*
- Adding and Managing Members*
- Patient Advocacy*
- Time Tracking*

COMMISSION MANAGEMENT:

- Producers and Splits*
- Receipts*
- Commission Payments*
- Commission Reporting*

MARKETING:

- Marketing Lists Made Easy*
- Campaign Management*
- Seminars and Events*
- Response Tracking*
- Reporting Results*

REVIEW AND Q&A



We convert your sales, marketing, and customer service processes into easy systems that work.





GBC ADMINISTRATOR TRAINING

This course is geared to GBC administrators who may or may not use the program. This class does not instruct the administrator in how to use GBC. Further, this class is generally customized to the specific needs of your company. Based on your use of GBC, certain topics will receive more or less attention.

PIMs, Customer Management, CRM

What GBC is and is not

Setup and Maintenance

- System requirements*
- Licensing*
- Installation Issues*
- System Settings*
- Business Units*
- Security*
- Creation and set up of users*
- User Preferences*
- Users' Managers*
- Teams*
- Territories*
- Removing users*
- Setting Up the Outlook Client*
- Data cleanup*
- Mass Changes*
- Database Backup*
- Troubleshooting Tips*

Database Design

- Precautions*
- Disclaimers*
- Entities*
- Entity Relationships*
- Fields/Attributes*
- Forms*
- OnLoad and OnChange Events*

Importing Lists

Exporting Lists

Reports

- Excel Interface*
- Report Wizard*
- Intro to SQL Report Writer*

Workflows

- Overview*
- Built-in Workflows*
- Building a simple workflow*
- Automating multiple processes*
- Testing and Troubleshooting*

Troubleshooting

Review and Q&A

In addition to the three standard classes, Power Time will design classes around your company's requirements, combining information from the various classes, omitting unnecessary information, or abbreviating classes for experienced users. Individual hourly training is also available to focus on specific needs.

Call Susan at 713.995.8455 to reserve or customize your class!

Group Benefits CRM is produced by Power Time Corporation, a Microsoft Certified Partner specializing in client management software since 1988.

