

The computer is a necessary tool in any office, much less the 21st century insurance office. Try to imagine running an office without the computer. No checks could be written, no quotes disseminated to the client. Without computers, how many CSRs or agents could quote a simple homeowner's policy. Are the company rate manuals up to date? Try to imagine the operation of an insurance office without the computer.

Yet many agents, CSRs and clerical staff are missing several simple tools to operate computers more efficiently. The trend in business today is to run faster and leaner. The mantra of being more organized means being more productive operates 24 / 7.

Section One, Techniques, deals with basic Windows techniques, geared to the Insurance business. Anyone who sits in front of a terminal should know, but probably doesn't. Techniques like Drag & Drop, Delete, Move, Folders, File Structure, Text file creation, Cut & Paste and the use of Control Keys are explained.

In the folder discussion, for example, the ability to create Insurance Folders for Cancellations, Changes and Marketing leads to applying this technique to emails, client files and producer files.

In the Text File discussion, the audience learns how to create fast loading, small files to keep a list of Company phone numbers, underwriters, extensions and markets. Another text file could be created to list the policies bound by the agency, or sitting on an underwriter's desk. This technique can even apply to creating a "To Do" list.

Password treatment is also discussed, as every insurance company has its own parameters for the issuing using and updating. This topic leads to the discussion of an Agency Disaster.

Section Two, Tips, concentrates on Organizing the Desktop, Windows Explorer, Document Conversion, Mail merge, System Tools, the Print Screen key, and Faxing Faxes.

Insurance companies live on Faxes. Clients probably do not. How can you get a company's fax to a client by e-Mail? Conversion between Paper, Images and Documents are discussed. There are hundreds of different file types, and converting one into another is far from transparent or obvious.

The attendee will learn how to convert a fax to a web page, a certificate of insurance to a fax, for example. The audience is encouraged to look at their own insurance companies' output. An explanation of ".pdf" files and their applications. A discussion on the pitfalls of the ".Doc" file structure is also held.

From an E and O standpoint, a discussion on inadvertently faxing privileged information about your client to an unauthorized receiver, and more importantly, how to correct the problem.

Section three, Traps, handles the following topics: Internet; Computer Maintenance; Hackers, Data Miners and Lowlifes; Backing up, Agency Disaster Plan, Software Updates and Continuing Education.

Of note, the discussion compares Internet Explorer, Netscape Navigator and Mozilla as web browsers, and how agents could organize their "Favorites" (Bookmarks) section. Computer Maintenance explains the necessity of Disk Cleanup, Defragmentation and Processor Dusting. Hackers and security issues, spybots and wireless networks are explained.

A Maintenance checklist is presented with daily, weekly and monthly operations that should be performed on the system. The rewards of vigilance are Reliability and Productivity. And the disaster plan for the insurance office anticipates a Hard drive crash and the use of the UPS.

The final topic discusses the necessity of updating. Software, Hardware, Staff and Owners all must be kept up to speed. If time allows, questions will be answered.