

AGENDA

Wednesday, May 8

8:00 am–3:00 pm	Partner Community Golf Outing – New Albany Links Golf Course
10:00 am–3:00 pm	Tour of Columbus
3:00 pm–6:00 pm	AUGIE Meeting
7:00 pm–9:00 pm	Welcome Reception – Columbus Airport Marriott

Thursday, May 9

		PARTNER LEARNING WORKSHOPS			
		Maximize Agency Performance & Value Education Sessions	Write More Business	Service Your Clients	Accounting
8:30 am–9:00 am	Conference Opening Session - Grand Ball Room				
9:00 am–9:50 am	Optimize your Agency – Principles for Maximum Efficiency – <i>Mary Eisenhart Belka, Owner, Eisenhart Consulting Group, Inc.</i>	Sales Best Practices for Prospect & Pipeline Management using Producer Results Manager	Set Your Agency Up for Success: Administration Best Practices	Best of Accounting Tips and Tricks	
10:00 am–10:50 am	Build the Team You Want – <i>John Rue, BUILT TO LEAD</i>	Marketing Best Practices using the Marketing Automation Manager	Better Claims Management and Download Strategies	Improve Management of Direct Bill Commission Downloads	
11:00 am–11:50 am	Technology and Customer Obsession: What Every Agency Can Learn from Amazon – <i>Steve Anderson</i>				
12:00 pm–12:50 pm	Lunch				
1:00 pm–1:50 pm	Perpetuation Story from the Front Lines – <i>Mark Perkins, CEO, Perkins Insurance</i>	Simplify Certificate Management	Get the Search Results you Want—System Search List Best Practices	Creating An Efficient Payroll and Commission Workflows	
2:00 pm–2:50 pm	Improving Performance Through Data Analytics – <i>Carey Wallace, CEO, IntellAgents</i>	Better Insights with Advanced Reporting	Creating Professional Proposals with Proposal Creator	Simplify Paying Producers with Commission Templates	
3:00 pm–3:50 pm	Growing your Agency with Marketing and Social Media – <i>Phil Richard, CEO and Jacqui Richard, Phil Richard Insurance</i>	Store, Retrieve, and Share Information Easier with Better Document Management	Streamline Written Communication between Partner and MS Word	Best of Financial Reporting	
4:00 pm–5:00 pm	Getting Ahead of the Risks: Secure Your Agency's Information – <i>Brad Ruben, Owner, Archway Computing</i>	Commercial Policy Management Best Practices	Best Practices for Managing Your Clients	Easy Company and Producer Reconciliation	

Friday, May 10

		PARTNER LEARNING WORKSHOPS			
		Maximize Agency Performance & Value Education Sessions	Write More Business	Service Your Clients	Accounting
8:30 am–9:30 am	Agency Networks Relationships, Panel Discussion – <i>Chad Eddy, CEO, Indium, Mark Perkins, CEO, Perkins Insurance, Brad Smith, President, Smith Berclair</i>	Agency Sales Tactics: Avenues to Revenue – <i>Kathy Mulder, Owner, Mulder Consulting</i>	Commercial Policy Management Best Practices	Accounting Basics	
9:45 am–10:45 am	Strategies and Tactics for Servicing & Retaining Clients, Panel Discussion – <i>Jen Wyels, President, Aspen Insurance Agency</i>	Email Management with Outlook Integration	Partner XE Enhancement Initiatives	Managing Month and Year End Processing	
11:00 am–12:00 pm	IVANS Updates – <i>Cal Durland, Interface Optimization Director, IVANS</i>	Self Service for Your Clients: Partner Client Portal	Staying Organized: Notes and To-Do List Management	Creating and Managing the Client Ledger	
12:00 pm	Lunch to-go				