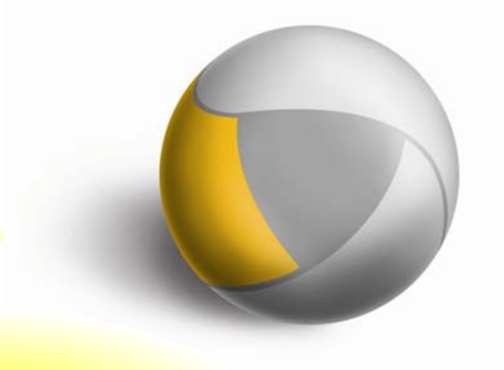
MI Management System Newsletter



April-May-June 2004

Quarterly Newsletter

INSIDE THIS ISSUE:

MI Users Conference July 28-29, 2004

MI-Assistant brings you the **2004 Annual MI Users Conference** at the **Holiday Inn - Campus Area** in Eau Claire, Wisconsin. The conference begins Wednesday morning and ends Thursday evening with the awards dinner at beautiful **Hillcrest Golf & Country Club**.

Reserve your hotel room at the special rate of $59 at the Holiday Inn for those mentioning MI Users Conference.
Holiday Inn - Campus Area: (715)835-2211

CONFERENCE HIGHLIGHTS

Wednesday, July 28
Educational and industry-specific discussions throughout the day, exhibit hall for clients and agents from 3-5 pm, lunch and casual dinner provided.

Thursday, July 29
Continental breakfast, morning keynote session-special industry guests, free shuttle to Hillcrest Golf & Country Club for 4-person scramble with lunch and prizes (golfers only), and awards dinner.

Registration Information Online
http://www.mi-assistant.com/miassistant/news/2004+mi+users+conference.asp

What Version?

The most current version of the MI Management System is 5.3.0.0. Please do not attempt the 5.3.0.0 update if version 5.2.0.0 has not been completed. If your version is 5.1.0.2 or lower, contact support to schedule an appointment for an update at support@mi-assistant.com.

To find out which version of MI Management System you are running, click Help and then About.

Need Technical Support?

http://support.mi-assistant.com/

From The Customer Service Technical Support Archives

By Jennifer Thompson, Customer Service
MI-Assistant

Can icons be added to my Banner?

It is possible to add any icon that you would normally place on your desktop onto your Banner. You will need to know the executable file that starts the program.

Example: Add a Calculator button to the Banner.
1. At the main screen, go to Tools, Setup Buttons.
2. Click New.
3. Browse for the executable file.
Windows 9x: c:\windows\system\calc.exe
Windows NT/2000/XP: c:\winnt\system32\calc.exe
4. Click Save.
5. The icon is now on the list of icons. Use the red arrow to move it up the Banner.

Can I print envelopes or labels for companies or contacts in my address book?

At this time, you can't print envelopes or labels for the companies or contacts in your address book. This is something that we plan to change, but you could work around this in the mean time. Type these items in a Word processing document. Highlight the name and address on the document and go to Tools, Envelopes and Labels. Save the document on the network drive for all to use.

One creative agency put all of their companies and lien holders into the Prospects button on the Banner. Under the Letters button in Prospects, they copied the client envelopes and changed them to pull info from the prospect database instead of clients. Now they can print envelopes for their companies and lien holders.

When I try to go in the Management System, I get the error "System is busy. Please try again."

This most frequently occurs when the Pack Tables task locks up or is closed by a user before it has completed. To resolve this, a file needs to be deleted from the Management System directory.
1. Click Start, Find or Search, Files or Folders
2. In Named, type busy*.* .
3. In Look In, choose the server drive (i.e. F:\)
4. Click Find.
5. When it locates the file called busy_nologin.txt, delete it (right-click, delete)
6. Close Find.
Users should be able to enter the system now.

Marketing Tidbits

Simple steps to marketing

1. *Understand your client market and competition*
2. *Understand each customer's needs*
3. *Pick a niche, dominate it, then move on to another*
4. *Develop and know your agency's marketing message*
5. *Figure out your marketing mediums (radio, email, etc.)*
6. *Set your sales goals*
7. *Set your marketing goals*
8. *Develop your budget*

Shane Vetterkind, Marketing Coordinator
MI-Assistant - A Division of Fiserv FSC, Inc.

How do I find out what my IVANS account code is?

Your IVANS account code is stored in the MI Management System. If a carrier ever requests this information, go to Tasks. Highlight View Company Download Information and click Execute. Click on Mailbox Information. The carrier needs to know the Network Account and Network User ID.

How many certificates should I have per client?

ONE. You may have as many certificate holders as needed, all attached to the ONE certificate. Each month we see agencies that have been creating a new certificate each time one is requested. Instead of creating a new certificate each time, go to the Forms tab in Clients. Switch to Certificates. Highlight the one certificate and click open. Change the form date, update the areas, then go to the Certificate Holder tab and add the new certificate holder. Click on the print icon to print the current certificate holder. To print all certificates, go to File, Print All.

Now that you have only one certificate, you can print a list of all certificate holders attached to this certificate. This is done in Clients, Letters, Form Reports. Highlight the Certificate Holder Report, click Print. It does a print preview and then opens a report that can be printed.

To delete certificates that you do not need, go to the Apps button on the Banner. Switch to Forms-Non-Apps. Highlight Certificate of Liability Insurance and click OK. Type in the client's name and delete out all unnecessary certificates.

What can be downloaded into MI Management System?

At this time, the management system will accept downloads of Personal Lines: auto, home,

Continued from page 2

watercraft, dwelling fire, and inland marine. Not all companies download all of these lines of business.

We are not able to download umbrellas, commercial lines or any commission information. Umbrella download will be likely in the future. Not many companies have the capacity to download commercial lines. We have visited agencies that have a management system with other vendors that can download commercial lines and they have turned it off because it was not as good as the data they were entering. At this time, writing a commercial download is not a high priority. We are investigating the possibility of downloading commissions, but again, not all companies will have this capability.

I have a lot of pending policies showing up on my reports when I am filtering on active policies only. How can I change these to inactive?

1. Click **Apps** button on Banner.
2. Select a line of business, click **OK**.
3. Change status filter to **Active** only.
4. Type **Pending** for policy number.
5. Click **Utilities**.
6. Check **Inactive**.
7. Click **OK**.
8. Click **Yes** to **Are you sure?**
9. It will indicate that no records were selected and ask if you want to do all the records displayed. Click **Yes**.

This will mass update them to inactive status. Do this for each line of business.

When trying to print a Personal Auto policy, I get "Cannot create PDF."

A few of the ACORD forms are state specific: personal auto, commercial business auto and garage dealers. If you attempt to print one of these applications for a state that we do not support (we support– IA, IL, IN, MN & WI), you will receive this message. At the top of the application screen, change the state on the application to one of these states.

Putting a Face to a Name

Name: Chuck Becker

What do you do at MI?
I offer support to customers that use the MI Management System and MI Comparative Rater.

How long have you worked at MI?
1.5 fun and exciting years.

Where do you live?
I live in the small town of Osseo, Wisconsin.

Who are the significant others in your life?
I have three! My oldest son Chuck who is 21, which, by the way, was born on my birthday! He is a U.S. Marine currently living in North Carolina. His Company may be shipping out overseas later this year. Then there is Gavin, who is 6 and Morgan, she is 4. With the grace of God, I hope I am able to make it through the teen years again!

What do you like to do besides working at MI? Tinker with old cars, fish, go boating and water skiing, go biking, and camping.

What do you like about your job?
Coming to work knowing that there is something new in store for me that day. Every day is a challenge just like life itself. I feel that my job is an extension of my life and my life has a reflection on my job and everyone around me. I try to go to work with a positive outlook for the day. I like to be able to release that positive charge to everyone I am in contact with. I enjoy knowing a positive charge of life has been sent to everyone I am in contact with.

Resource Group Contacts and Meeting Locations
http://www.mi-assistant.com/miassistant/resource+groups/default.asp

Western Wisconsin
President: Vicki Buck
vbuck@chibardun.net
Adventures Restaurant and Pub
Rice Lake, Wisconsin

Eastern Wisconsin
President: Kathy Mulder
kathymulder@nolaninsuranceagency.com
SECURA
Appleton, Wisconsin

Eastern Iowa
President: Lori Welch
lwwelchs@iowatelecom.net
Guesthouse International Inn & Suites
Cedar Rapids, Iowa

What's Next?

Memos Update
Move to client/server database for stability and speed
Spell check
Font formatting
Template designer

Did You Know?

Top values consumers have in agents:

- Assistance and Advice
- Information & change requests
- Face-to-face interaction
- Advocate in disputes
- Member of community
- Represents several companies
- Friend

Source: Viewpoint Magazine

MI Management Training Center

MI Management System training sessions were held at our Training Center in Eleva, Wisconsin on March 15-17. Fifteen agents represented Illinois, Iowa, Minnesota and Wisconsin. Additional trainings will be held this coming September 26, 27, and 28, 2004.

For a registration form, or for questions on the MI Management System Training in September, email trainings@mi-assistant.com.

The Real-Time Revolution

By Mike Peterson, V.P. of Product Management
MI-Assistant

You may have already heard of the "Real-Time Revolution", if you haven't, you are sure to hear a lot about it in the months to come. The Real-Time Revolution refers to how our industry, workflows, and lives are changing because of the change in how data (information) is distributed. The cornerstone of much of this change is the Internet.

For many years, data has been stored in a digital format, mostly in the form of databases. Although this got rid of the paper, the data was only accessible by the few that had a database connection. This was mostly limited to "insiders". Today, through the use of a web-browser or a web service, data is being distributed to the masses. Some examples that come to mind are internet banking, investing, and travel arrangements.

The insurance industry is also being affected. Today agents can quote, bind, and issue on-line. They can inquire to the status of a policy or claim as well. All of this is provided today through carrier websites. Although this appears to be progress, it doesn't quite achieve what our industry has been chasing for years, which is commonly referred to as Single Entry Multi Company Interface, or more commonly referred to as SEMCI.

We have heard time and time again from our customers that they don't want to learn how to use multiple websites, let alone, re-enter data over and over again. Therefore MI is embracing real-time opportunities in order to add value to our products and make you more productive. We recently completed the release of MI Comparative Rater 3.0. This version of the rater program offers the real-time ordering of MVRs, Property Loss History Reports, and Insurance Scores better than ever before. This will save you valuable time and accuracy as you will no longer have to re-key information into multiple sites to receive an accurate quote. In addition, version 3.0 supports the upload of that information to more than 24 websites and company systems.

Next newsletter we will discuss how real-time will be improving your productivity when using the MI Management System. In the meantime, if you would like to learn more about how the real-time revolution can improve your quoting workflow and productivity, call MI today.

Vendor Spotlight

Ask The Right Questions To Find The Right Technology Service Provider

By Scott Johnson, Technology Advisor
PC Solutions

Technology glitches are the last things you want to deal with when trying to obtain a quote or provide policy information to your customers or prospects. Your critical information needs to be fast, accurate and secure. That's why it's essential that the network configuration you have in place efficiently supports MI-Assistant, and other industry-specific software.

To get the most out of your technology investment, spend some time asking the right questions of potential service providers. This helps ensure the technologies you rely on provide you with the productivity and efficiency you need. Your software and computer equipment have become more and more critical over time, so look beyond the simple comparisons of products and/or services and select a technology service provider as a partner in your agency's success.

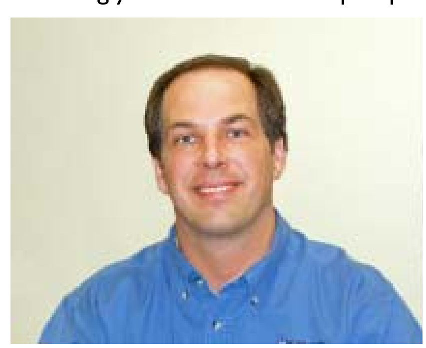
A common misconception is that you are limited to the service providers in your area. Today, a large percentage of service work can and is performed through the Internet. Use this flexibility to your advantage by widening your search to include service providers in other cities or states with the skills and experience to meet your specific needs.

There are several important questions to ask when looking for an appropriate technology service provider. Of course, there are the obvious questions regarding experience with industry specific software such as MI Assistant and questions about the number of certified technicians on-staff.

However, there are several less obvious but no less important questions.

- Is the technician adept at ensuring network configurations support MI-Assistant and other industry software?
- Will the technicians act as a liaison between your agency and software/ hardware companies?
- What is the average phone response time and on-site response time?
- Is the service provider warranty authorized to repair the equipment you have?
- How many technicians would be working on the network?
  (2 – 3 should be the goal.)
- How can technology make my agency operate more efficiently?
- How can my agency plan for tomorrow's technology needs?
- Is remote technical service available?
- Are help desk services available?

By spending the time to pose these questions to your prospective technology services provider today, you'll help ensure smoother agency operations. You'll also be able to spend your time doing what you do best – servicing your customers and prospects.



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