

Users Group 2010 Agenda

Wednesday, October 27, 2010 to Thursday, October 29, 2010

Wednesday, October 27, 2010			
Time	Track	Title	Host
9:00 AM - 1:30 PM	All	Registration	
10:00 AM - 12:00 PM	All	Open Session Ask and you shall receive. This is an open session where you can ask our staff any question on our software products PAM,SARA, ASHLEY and AUDREY	Monty Roach Brad Peck Andrew Mueller Rob de Waal
12:00 PM - 1:30 PM	Lunch		
1:30 PM - 2:15 PM	All	Opening and Welcome	Monty Roach
2:30 PM - 3:30 PM	Survey/ Audit for Customer Satisfaction and File Review	Form scoring and Best Practice Assessment Learn Best Practices for Scoring Forms	Monty Roach
2:30 PM - 3:30 PM	Audit	Customer Satisfaction Surveys Learn to build, send, review and manage customer satisfaction surveys	Andrew Mueller
3:45 PM - 5:00 PM	Audit	E-mail Notifications Learn to use email notifications and watch your productivity skyrocket. Use the system to alert and notify staff and customers alike!	Brad Peck
3:45 PM - 5:00 PM	Survey	Survey Output Report Views (Survey Track) Make the best output for your audience	Andrew Mueller Dan Rogaliner
Thursday, October 28, 2010			
Time	Track	Title	Host
9:00 AM - 12:00 PM Break from 10:30 to 10:45	Audit	Audrey Session Audit Workflow Workers Compensation and General Liability Audits Carrier to Fee Co assignments Audrey Setup Synchronizing Scheduling Notes Progress Working the audit Time Entry Combination Audits Duplication process Garage Liability Audits Importing Audit Data into the Worksheet General Excel QuickBooks	Rob de Waal

9:00 AM - 10:30 AM	Survey	Recommendation Process How to enter, distribute, follow-up with Recommendations in your system 3 Ways of Entry Assigning Distribution to Responsible parties Electronic follow-up online Tracking and Diary system	Andrew Mueller
10:45 AM - 12:00 PM	Audit - Non Field Staff	Monthly data collection and pay-as-you-go Audits Learn how to set up monthly audits and have customers import data and into forms for monthly and pay as you go billing	Monty Roach
10:45 AM - 12:00 PM	Survey	E-mail Notificaitons Learn to use email notifications and watch your productivity skyrocket. Use the system to alert and notify staff and customers alike!	Brad Peck
12:00 PM - 1:00 PM	Lunch		
1:00 PM - 2:20 PM	Audit/Survey/Technical	Installing/Updating/Backup ASHLEY and AUDREY Anyone who uses or supports our field software needs to be aware of the new process for installing and updating the laptops on the remote computers. New Installation Update Installation Backup database	Dan Rogaliner
1:00 PM - 3:00 PM	Audit/Survey	Letter Printing, Distribution, and Central Batch Print Learn all the different options for sending communication electronically and by mail.	Brad Peck
3:15 PM - 4:00 PM	Audit	AuSuM Data See a new product offering and how to get meaningful results from the data in the system.	Brad Peck Monty Roach
4:15 PM - 5:30 PM	Survey/Audit/Technical	Reports Builder How to build your own reports and get at the data.	Monty Roach
7:00 PM - till?	All	Reception	
Friday, October 29, 2010			
Time	Track	Title	Host
9:00 AM - 10:30 AM	Survey	Customer Satisfaction Surveys Learn to build, send, and review and manage customer satisfaction surveys	Andrew Mueller
9:00 AM - 10:30 AM	Audit	Auto Commit It is not just for Carriers feeding data anymore! Learn how to set up rules to flag certain audit conditions to note issues to processors and reviewers.	Monty Roach
10:45 AM - 11:45 AM	All	New Features Highlights Assignment Rules Method Rules Asset Values Interface Multiple Field Staff to Survey And more!	Brad Peck Monty Roach Rob de Waal Andrew Mueller
11:45 AM - 12:15 PM		Closing	Monty Roach
12:15 PM - 1:30 PM	Lunch		
2:00 PM - 4:00 PM	Fee Companies	Fee Company Meetings	