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### **About this Article**

*This article provides independent agencies with practical guidance on ten tools that could boost their productivity and marketing effectiveness in 2010.*

## **Ten Technology Tips to Enhance Your Agency's Productivity**

By Steve Anderson

In today's environment, getting the most out of an agency's technology investment is critical to maximizing staff productivity and bottom line profit. While training your staff to fully use the functionality in your agency document and policy management systems is certainly important, I have found that the effective implementation of small, innovative tools can also produce significant productivity gains. In this article, I discuss my candidates for the top ten cool tools in 2009 that deserve your attention.

### **Voice Recognition**

People have always talked to their computers — using four-letter words in many cases — and until recently, computers didn't listen very well. Affordable, usable, and reliable voice recognition software has been an “any day now” technology for at least a decade. This technology has finally become a useful tool. If you tried it in the past and gave up you should give it a fresh look. I use and recommend Dragon NaturallySpeaking (version 10 preferred).

After installing the software, you will need to spend about 15 or 20 minutes to train it to your voice. After that, accuracy should be about 95%. And as you use the software to correct recognition mistakes, it learns from the mistakes and recognition accuracy improves. The software works seamlessly with Microsoft Word, Excel, Internet Explorer, and Outlook. It is available at many retail stores and through [www.nuance.com](http://www.nuance.com).

### **Easy Video E-mail**

Getting your message through to existing clients and prospects takes creativity. Everyone experiences e-mail overload. Anything you can do to make your E-mail message stand out in an Outlook inbox is a good thing. Eyejot is a web based service that allows you to quickly and easily send Video email (v-mail) to anyone. All you need is an inexpensive web cam and an Eyejot account. The best part is that the basic service is free (at least for now).

With a web cam and an Eyejot account, it really is as easy as clicking record and speaking to the camera to create and then send a v-mail. The actual video is stored on the Eyejot servers and an e-mail is sent to the recipient. The recipient clicks on a link and your video message is played.

You can use Eyejot to communicate with clients. If you do, then the PRO Plus version is worth the \$100 per year cost. Messages can be a maximum of five minutes in length; you can upload pre-recorded video; you have extended message storage time; it is advertising free; and you have the ability to attach and send documents. You can brand several Eyejot notification elements with your agency logo and color scheme. The service also will alert you when your video messages have been viewed. ([www.eyejot.com](http://www.eyejot.com) )

### **Manage Unstructured Information**

I read lots of information from many different sources. The problem I have is deciding where to store all of this information so I can find it again when I need it. I've tried several methods; none that worked very well.

Evernote is a program that allows me to capture information easily in any environment using whatever device or platform I happen to be using, and makes this information accessible and searchable at any time, from anywhere. There are three parts to the Evernote system: a program (for Windows or Mac), a website where all data is synchronized and stored, and a mobile phone application. Here is how it works.

First, you capture the things you want to remember using any platform you are using at the time—your Windows laptop, the Web, or your mobile phone. If you are reading an article on the Web, you can select the text of the article and trigger the Evernote hotkey (Windows-A). The captured text is stored in the Evernote program database that resides on your computer. That information is synched with your Web account when you are connected to the Internet.

You also can use your mobile phone to take a note or a snapshot. This information is uploaded to the Web account and then synched with your computer the next time you connect to the Internet. For example, I have taken a snapshot of a bottle of wine that I wanted to remember. That picture went to my Web account and then to my desktop—seamlessly. Best of all, the information is run through a recognition technology and indexed for fast searching and retrieval.

([www.evernote.com](http://www.evernote.com) )

### **Understand Your E-mail**

A free plug-in module for Outlook called Xobni (pronounced “ZOB-nee” which is inbox spelled backwards) adds some social networking and data-mining features to your existing Outlook e-mail. Once installed, it lives as a vertical panel on the right side of your Outlook screen and doesn't block or intrude upon Outlook's own panes or functions.

Xobni indexes all of your stored e-mail, starting with the most recent messages. Once your e-mail is indexed, the Xobni sidebar shows a profile of the sender for any e-mail you have selected in the message list in your inbox or other folders. Each profile is divided into different sections, including a search box that is much faster than Outlook's search function.

Other sections include the name of the sender for any e-mail you have selected, with a photo (if available), a phone number, and a bar chart showing how many e-mails you've received from that person, as well as times of day when that person appears to be most or least active on e-mail. Also included is the sender's e-mail network—other people included in e-mails to you, “Conversations” which display e-mail threads (other e-mails you've exchanged with the sender), and a section which lists all the files that are attachments on received e-mails. ([www.xobni.com](http://www.xobni.com))

### **Adding Instant Message Capability to your Website**

Are your clients able to communicate with you any way they want—whether by phone, e-mail, Web, call center, or live access? Instant Messaging (IM) is an option that is becoming easier to implement. Understandably, agencies are often concerned about the practical aspects of IM. How will the conversation be documented? Is it worth the time?

One service worth considering is Provide Support, a software and Web process that provides a "Live Chat" option on your website. You are given code that enables you to add a button on your site that a client can click to start a live chat with someone in your office. You select individuals who become part of a chat rotation. When someone clicks on the Web button, a box pops up on the computer of the next person in the rotation. That person is responsible for the instant message conversation.

The price depends on how many users you add. One user costs \$99 annually, three users is \$198 annually, and ten operators is \$396 annually. The software provides a transcript of each conversation after the call is finished, along with a management recap at night. ([www.providesupport.com](http://www.providesupport.com))

### **Automatic Web Searching**

Google offers a host of tools that will help streamline your online experience. One of those services is Google Alerts. Google Alerts performs predefined searches automatically daily. New results are E-mailed to you when new items are found for the specific search terms you want to track on an ongoing basis.

What kinds of topics make for interesting Google Alerts? Well, if it's interesting to you, it's a good subject for a Google Alert. You could set up an alert to monitor news items for your largest 25 clients. Or, you could use them to keep current on a competitor. They are also useful for keeping up-to-date on what's happening in a particular industry. We use it to automatically track information about major insurance technology vendors. To create customized alerts, simply visit the Google Alerts home page, create a Google account (it's free), enter your search, the type of alert you'd like (News, Web, etc.), how often you'd like to receive results, and your e-mail address. When you're done, click the "Create Alert" button. You will receive a confirmation e-mail. Clicking the link in the e-mail will activate your Alert. (<http://www.google.com/alerts>)

### **Send & Receive Large Files**

Being able to attach large files to an e-mail to send to someone else is becoming more difficult as organizations place limits on the size of received e-mails. This problem can arise when trying to send a submission to an underwriter or with a client who needs to send you a picture or large

spreadsheet. SendThisFile.com and YouSendIt.com are Web-based services that streamline the process of sending and receiving large files.

Using either service is as easy as entering the recipient's e-mail address into a form, selecting the file you want to send, and clicking the Send button. The recipient receives a link to his or her file via an e-mail message and then clicks on the link to download the file to his or her computer. There are no e-mail attachments and no software to install. There are no file size limits so any file up to 2 gigabytes (a browser limit) can be sent. A free account is available to test the service and for sending a small number of files. ([www.sendthisfile.com](http://www.sendthisfile.com) or [www.yousendit.com](http://www.yousendit.com))

### **Easily Manage Website Passwords**

Managing multiple website passwords is one of the more difficult tasks for agency personnel. While tools like Transformation Station and TransactNOW help with this process, there continues to be many sites that your staff goes to daily where they have to manually enter User ID and password information each time.

RoboForm is a tool that can help. I've been using it for a while and don't know how I got along without it! The program installs as part of your Web browser (either Internet Explorer or Firefox) and manages login and passwords for you. When you log into a website, RoboForm offers to save the online login information into a Passcard after you click the Login/Submit button. The Passcard is saved into a fully encrypted file that requires a master password to access.

Once the login information page is saved, a true one-click login is available by clicking on the website name in the Passcard list. The program automatically navigates to the website's login page, fills the stored login information into the form, and clicks the submit button. You are logged in with one click. ([www.roboform.com](http://www.roboform.com) )

### **Reduce Keystrokes**

I hate keystrokes. I am always looking for ways to eliminate or at least minimize the number of keys that have to be typed during a day. A program I rely on extensively is called ActiveWords.

Simply described, ActiveWords turns words into actions. What I like about the program is that these actions are highly customizable. ActiveWords allows you to leverage your vocabulary and innate naming ability using words you enter or select in any context to substitute text. It's Word's "Auto-Correct" on steroids.

For the first time you can use text substitutions in any program that accepts text input. For example, I type my e-mail address into different forms and programs a lot. Now I type "sa," hit the spacebar twice (the ActiveWords action key) and our full e-mail address (steve@steveanderson.com) is inserted into the field. Three keystrokes versus 23 keystrokes. A savings of 20 keystrokes. So what? Multiply that by the number of times it is typed in a day and it adds up, not to mention the increase in accuracy. And these text substitutions can be used across your entire computing environment. Think about your agency management system and the number of times the same information is entered over and over again. These entries can be assigned to a code or short phrase and be inserted automatically. ([www.activewords.com](http://www.activewords.com))

## **Outlook Rules & Alerts**

“E-mail is one of the biggest productivity drains in an insurance agency today.” When I make this comment during presentations, most people in the audience nod their heads in agreement. At the same time, it’s hard to imagine running a successful agency without being able to use e-mail as a communication tool. The problem with e-mail is not the e-mail. The problem is us. As the use of e-mail has exploded over the last several years, we have not stopped to figure out how to effectively manage our Outlook inboxes. The first step to begin to learn how to manage E-mail is to master Outlook Rules and Alerts.

### *Outlook Alerts*

Most people use Outlook alerts to notify them when new e-mails arrive. The problem with alerts is that they interrupt your train of thought when you're working on something else. The alert pops up and you naturally look at the e-mail to see if it's something you need to respond to right away. If the e-mail doesn't require your immediate attention, it takes you a few minutes to get back into the project you were working on prior to being interrupted. Turning off alerts will help.

### *Outlook Rules*

For e-mails that do deserve immediate attention, create an Outlook rule. Outlook rules will help you flag a particular e-mail so that you can respond appropriately. For example, you might want to set up a rule that whenever an e-mail is received from one of your top ten clients, Outlook will notify you of the received e-mail. There is a tremendous amount of functionality available in Outlook rules. Fortunately, Outlook provides a step-by-step process that allows you to create a rule easily. Once you get more familiar with the process of creating rules, you can use more advanced options to fine-tune how the rule will function for you.

You can learn how to use both of these tools by going to Outlook help and entering “Rules and Alerts.”

Each of these tips may not be appropriate for every agency, but I encourage you to try them out. Many agencies have seen significant productivity gains by employing these tools in their organizations.

*Editor’s Note: You can subscribe to Steve Anderson’s free weekly emailed newsletter, “TechTips”, by going to [www.steveanderson.com/act](http://www.steveanderson.com/act) and subscribing. Tech Tips is a quick read and highlights one new “thing” that will help your organization increase its productivity and effectiveness.*

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