

SmartOffice®

For Wholesalers



PROVEN IN PRACTICE

Product Overview

> *Helping financial services wholesalers build channels that produce*

SmartOffice®

Will your distributors produce enough to exceed goal this year?

GET SMART

"At Jefferson Pilot Financial, we rely heavily on independent distribution. The ability of our wholesale team to establish and maintain strong relationships with the firms and producers in our network is key to our success.

We view solutions like SmartOffice to be an absolute necessity, providing the visibility and reach to stay top of mind with our channel, ensure they understand how our products provide superior value for their clients, and to help us deliver the highest levels of service."

Carol Rando
Vice President
Marketing & Distribution
Jefferson Pilot Financial

There's good news in the Canadian financial services industry. With banks, securities and mutual fund dealers, MGAs, and various other customer-facing firms now offering a host of financial products, the pool of potential distributors is growing. With the major shift to independent distribution, competition is as hot as ever. And while some organizations look to differentiate based on product selection and price, history has shown that these are difficult to maintain as a competitive barrier.

Does your wholesale team have a plan for winning over producers and distributors — and a method for maintaining their loyalty? With so many alternatives to choose from, the strength of your relationship is the only way to ensure long-term revenue growth.

To establish and maintain those strong relationships, you need SmartOffice from E-Z Data. Leveraging nearly two decades of successful use in the financial services industry, SmartOffice is ideal for wholesale teams. It helps you know your customer, deliver high levels of service, and secure a greater share of your distributors' business.

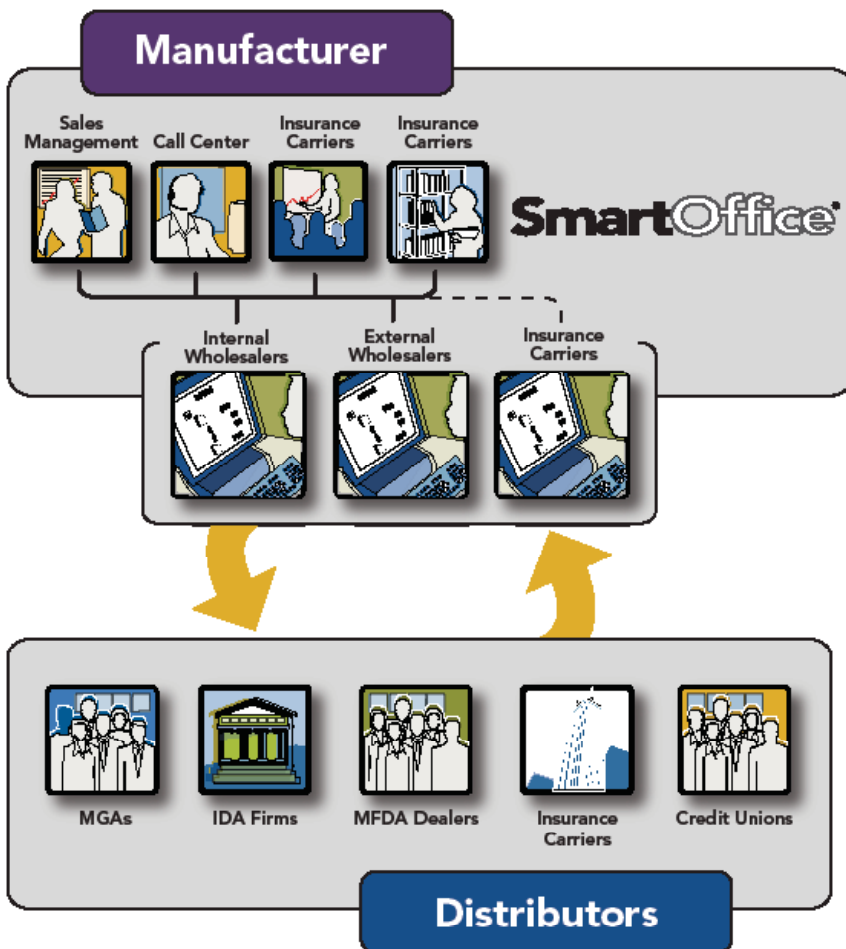
The result: Distribution partnerships that overachieve year after year



SmartOffice helps drive success

by bringing together the tools you need to build strong customer relationships and the data that provides visibility into their production. SmartOffice helps wholesalers:

- > Gain a greater share of the distributors' business
- > Turn your customer database into a valuable sales tool
- > Produce effective seminars and marketing campaigns
- > Deliver an optimal product mix to each customer



SmartOffice® for Wholesalers

Arming the wholesale team with the tools to manage and grow your third-party distribution channels

SALES

Build high-performing distribution channels

● Contact/Account Management

Keep track of your top-producing reps and firms.
Track producers, including their reporting relationships within each distributor firm. View a snapshot of producer- and firm-specific activity, including production numbers, products sold, and pending cases.



● Calendar Management

Plan your work and work your plan.
Track your appointments, phone calls, projects, and associated follow-ups. Manage your own time and that of your staff, viewing the complete history of activities for a client in the SmartOffice SmartPad™.

● Client Journaling

A complete history of client interactions.
The SmartPad keeps track of all client interactions, from appointments and to-do items, to email and other correspondence. View your history with an individual person or see a chronological log of interactions with all people at the same firm.

● Microsoft Outlook® Integration

Freedom to move between your favorite applications.
If you use Outlook to send email, manage your schedule, or track contacts, no problem. SmartLink for Outlook synchronizes these items with ease. A complete history of Outlook activity is tracked in the SmartOffice SmartPad, without the hassle of double entry.

● Territory Management

Configure your team for maximum impact.
Define your wholesaler team hierarchy by channel, territory, firm, and rep. Territory areas are flexible to meet your needs and can be set up by code, and city. Even allows for named account overrides. Realignment of accounts is simple based upon your new territory definitions.

● Production Dashboard

Get visibility to the production in your territories.
The SmartOffice Production Dashboard provides views of distributor production by channel, territory, product, and rep. Simple to navigate, analyze production data in a spreadsheet format, or graph it to see trends. You can even compare performance over time. Ask about how E-Z Data's DataXchange Enterprise Server can provide production data feeds from your internal systems.

● Sales Opportunities & Forecasting

Drive the success of your sales team.
With the ability to manage your pipeline of sales opportunities, you can increase the effectiveness of sales activity and eliminate the burden of forecast reporting. Map your team's best practices and track the progress of each opportunity by sales stage. Managers can view activities, plan sales strategies, and coach the techniques that close sales.



Manage your territory hierarchies, including producer/firm relationships.

* Some SmartOffice features are available as optional modules. Your sales representative can help you configure a solution that's right for you.

MARKETING

Heighten product awareness and your competitive differentiation

- **Marketing Profiles & List Management**

Create tailored marketing campaigns that have impact.

Cross-reference territory, firm, rep, and production information to easily generate targeted lists for your marketing messages. Conduct campaigns via mail, email, or telemarketing to drive future business for your firm.

- **Mass Email/Direct Marketing**

Simplify your mass marketing efforts.

Using existing contact information, you can generate and print mail merge letters or broadcast email/fax blasts. A messaging queue automatically handles requests and feeds them to your printer, email server, or fax server.

- **Materials Fulfillment**

Fulfill collateral requests with ease.

SmartOffice makes it easy to view a full listing of collateral materials, such as product literature, company brochures, and giveaways. Users can see quantity available (or out-of-stock status), select materials, identify a recipient, and request shipment. Order alerts are sent automatically to the person responsible for physical shipments, and a current delivery status can be viewed at any time.

- **Seminar Management**

Deliver seminars that strengthen your channels.

Seminars are a great way to get the word out on new products or services. SmartOffice can help you plan and manage seminars to ensure results. Coordinate resources, issue invitations and reminders, maintain RSVP and waiting lists, and report on expected results by seminar.

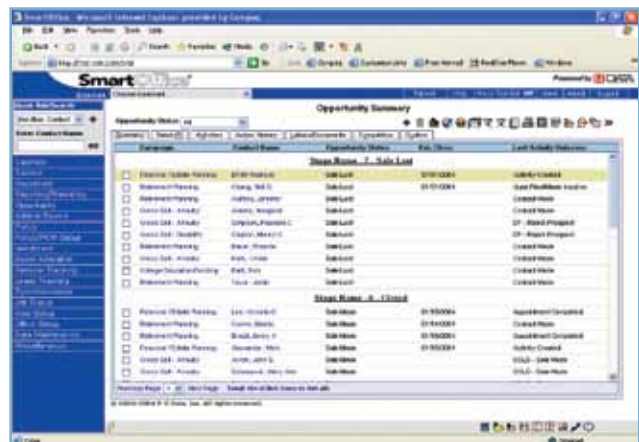
- **Telesales/Telemarketing Call Scripts**

Ensure consistent sales messaging and processes.

As a tool for direct marketing or sales development, use SmartOffice intelligent marketing scripts to deliver the right message every time and set up and clear next-steps for each call. SmartOffice tracks call activity, distributes leads, and produces management reports to help measure the effectiveness of your telemarketing efforts.



Get up-line and down-line production visibility and analyze performance using the Production Dashboard.



Track the pipeline of new distributor opportunities or those associated with new product offerings.



SMARTOFFICE MOBILE

Mobile Computing

Take SmartOffice on the road

Your office is the picture of automation. Your whole staff connected. You have customer information at your fingertips. So why is it you end up hitting 'print' in preparation for every meeting outside the office?

It's time to take your office on the road with SmartOffice Mobile. Using your notebook or Personal Digital Assistant (PDA), you can view, add, and modify information away from the office, and then quickly and easily synchronize changes when you get back to your desk, or use the Internet or a wireless connection to update your files remotely.

Besides basic client contact information and appointments, SmartOffice Mobile provides access to your clients' investment and policy information, so you're totally prepared in every meeting. You can even flag correspondence to be automatically sent when you return to the office.

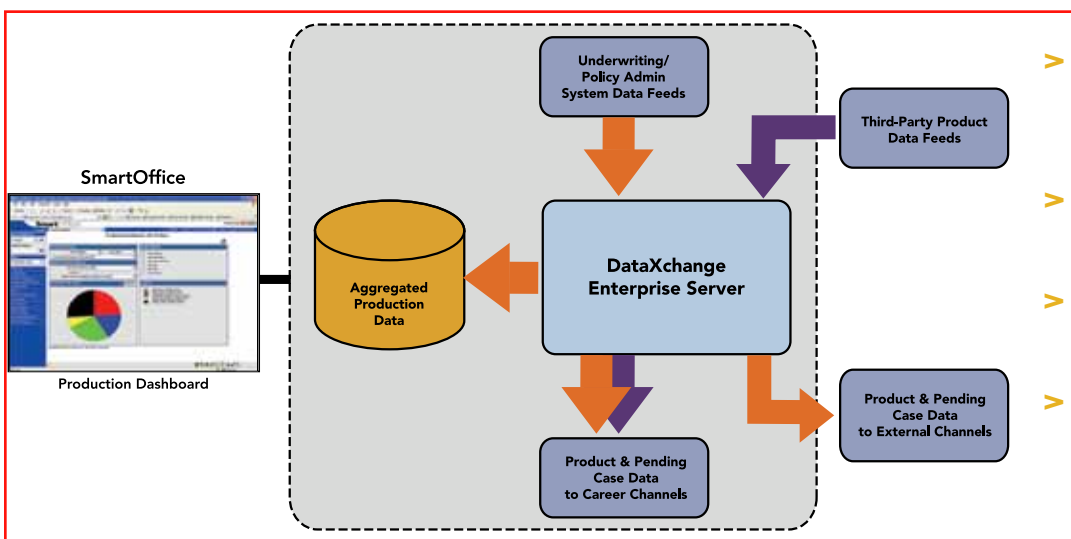
SmartOffice is fully compatible with most popular mobile devices, as well as your Microsoft® Windows®-based notebook.

DataXchange™ Enterprise Server

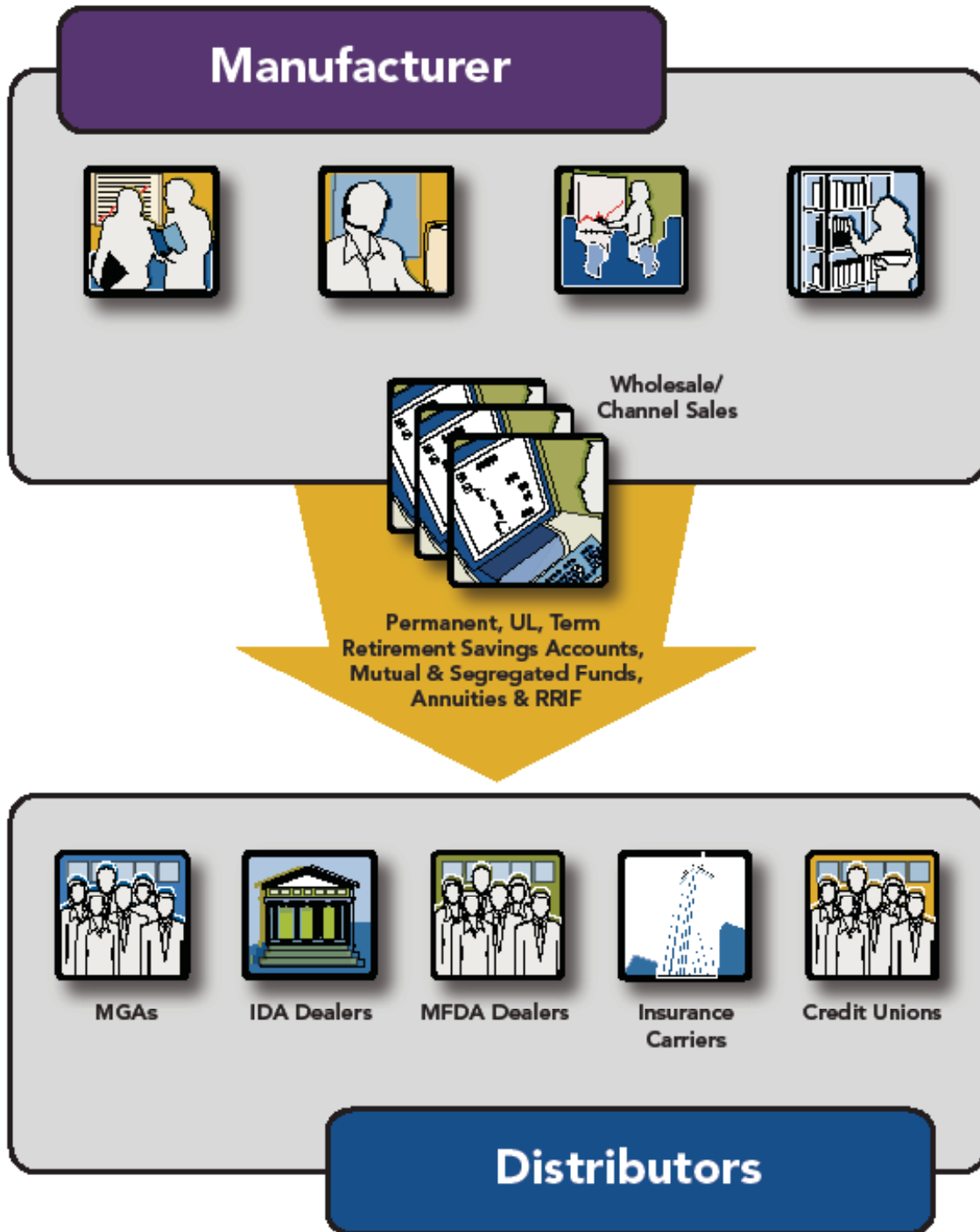
Simplifies the movement of both legacy and third-party data into SmartOffice, providing end users with a complete view of channel production.

From the channel sales representative to the head of product distribution, getting a top-down view of channel production can be a challenge. Together, SmartOffice and DataXchange Enterprise Server combine to provide visibility into your production numbers

and help your team put them to work. In addition, by utilizing standard data formats like ACORD XMLife, DataXchange simplifies the process of pushing data down to your distributors, helping make your company the easiest to do business with.



- > Help maintain an accurate view of the producers in your sales channels
- > Get the visibility needed to ensure compliance
- > Help reps strengthen their client relationships
- > Help reps attract and retain more clients — and more assets per client



SmartOffice
helps synchronize
your channel
distribution
efforts

SmartOffice helps you synchronize the efforts of the entire organization responsible for third-party distribution. Whether growing through internal or external sales channels, it helps the wholesaler stay top of mind with distributors and producers, and deliver the level of service that leads to long-term loyalty and high levels of production.

SmartOffice is offered both as a software solution installed in your environment or as an online solution managed in our world-class Canadian hosting facility. Either way, your business will benefit from the most comprehensive system available to address the unique needs of your financial services organization.

To learn more about how SmartOffice can help you take your business to new heights of success, visit www.ezdata.ca or call us at 800-777-9188.

ABOUT EBIX

A leading international supplier of On-Demand software and E-commerce services to the insurance and financial services industry, Ebix, Inc., (NASDAQ: EBIX) provides end-to-end solutions ranging from infrastructure exchanges, carrier systems, agency systems and BPO services to custom software development for all entities involved in the insurance industry.

With 23 offices across Singapore, Australia, the US, New Zealand, India and Canada, Ebix powers multiple exchanges across the world in the field of life, annuity, health and property & casualty insurance while conducting in excess of \$100 billion in insurance premiums on its platforms. Through its various SaaS-based software platforms, Ebix employs hundreds of insurance and technology professionals to provide products, support and consultancy to thousands of customers on six continents. Ebix's focus on quality has enabled it to be awarded Level 5 status of the Carnegie Mellon Software Engineering Institute's Capability Maturity Model (CMM). Ebix has also earned ISO 9001:2000 certification for both its development and BPO units in India. For more information, visit the Company's website at www.ebix.com.

