XDimensional Technologies | 2023

Xperience

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MONDAY, SEPTEMBER 25				
2:00 – 8:00 PM	Registration Open			
6:30 PM	Welcome Reception			
TUESDAY, SEPTEMBER 26				
7:00 AM – 4:30 PM	Registration Open			
7:30 – 8:30 AM	Breakfast			
8:30 – 10:00 AM	Opening General Session			
10:00 – 10:15 AM	Break			
10:15 – 11:45 AM	General Session			
11:45 AM – 1:00 PM	Networking Lunch			
1:00 – 1:45 PM	EPIC Case Study	API Capabilities in Nexsure via Enterprise Application Integration	Tips and Tricks for Utilizing Search	Introducing the New Home Dashboard
1:45 – 2:00 PM	Break			
2:00 – 2:45 PM	Worldlink Case Study	EAI Stories	Tips and Tricks for Streamlining Policy Servicing	Client Entity Overview
2:45 – 3:15 PM	Networking Break			
3:15 – 4:15 PM	Byrnes Agency Case Study		Actions in Nexsure	Extend Your Reach with Automation
Evening	Free Evening			
WEDNESDAY, SEPTEMBER 27				
7:00 AM – 4:00 PM	Registration Open			
7:30 – 8:30 AM	Breakfast			
8:30 – 9:30 AM	General Session			
9:30 – 9:45 AM	Break			
9:45 – 10:30 AM		Cloud Update and Security Overview	Overview of Workload Analysis and the Effort Quotient	Introduction to the Redesigned Carrier Entity
10:30 – 10:45 AM	Break			
10:45 – 11:30 AM	PMC Case Study	Reporting in the Nexsure Insurance Platform		Introduction to the Redesigned Retail Agent Entity
11:30 AM – 12:30 PM	Networking Lunch			
12:30 – 1:15 PM	Synchrono Case Study		Overview of Lead Management and Web Forms	Extending Your Reach with the Redesigned Insured Portal
1:15 – 1:30 PM	Break			
1:30 – 3:00 PM	Enhance Customer Experience with XDTI Partners	Receivables in Nexsure	Deliveries in Nexsure	Attachment Manager and Document Management
3:00 – 3:30 PM	Networking Break			
3:30 – 5:00 PM	General Session			
6:30 PM	Evening Event (The Painted Duck)			
THURSDAY, SEPTEMBER 28				
Morning	Breakfast / Departures			

Session Descriptions

TUESDAY, SEPTEMBER 26 – 1:00 – 1:45 PM

EPIC Insurance Brokers & Consultants Case Study
Presenter: Arthur Frisch

During this session, EPIC will discuss how they implemented their psychoanalysts' program on the Nexsure Insurance Platform.

API Capabilities in Nexsure via Enterprise Application Integration (EAI)
Presenter: Riyad Mammadov

Attend this session to learn about the power and usage of our Enterprise Application Integration (EAI) – XDTI's API offering. Attendees will walk away with an understanding of the system's capability, including the new submission API components. This session is designed for Business Strategists, Administrators, and Technologists.

Items to be covered:
- API purpose and sample integration scenarios
- API architecture and technology evolution
- Nexsure Developer Portal – online documentation and other features
- Key functionality by category
- Nexsure Entities XML Schema
- Demo – creating new client and policy
- Managing API keys in the Nexsure web interface

Tips and Tricks for Utilizing Search
Presenters: Nicolas Bourgery

This session will take a deep dive into the power of the new entity search engine within Nexsure. We will cover interpreting search results, pagination, items per page, filters, the result set, icons, highlighting and the right mouse click capabilities.

Items to be covered:
- Keyword Searching
- Non-Primary Highlights/Matching
- Filtering capabilities
- Correlation of new features to old features
- Context menu options

Introducing the New Home Dashboard
Presenter: Rodney Gist, Patrick Espeland

During this session, we'll introduce the new role-based, customizable home dashboard layout within Nexsure. This session will discuss the setup, security, and library of components, including details of the most exciting new metrics.

Items to be covered:
- Home Dashboard
- Panel Library
- Adding Panel
- Panel Security

TUESDAY, SEPTEMBER 26 – 2:00 – 2:45 PM

Worldlink Case Study
Presenter: Maia Koehler

During this session, Worldlink will discuss how they implemented their Non-Owned Aircraft Liability program on the Nexsure Insurance Platform.

EAI Stories

Presenters: Riyad Mammadov, Steve Hartman, Others TBA

During this session, a panel of customers will discuss how they took advantage of EAI in order to incorporate Nexsure into a business workflow that involves multiple software systems from different vendors.

Tips and Tricks for Streamlining Policy Servicing

Presenter: TBD

During this session, we'll share shortcuts on typical policy servicing processes. We will show the fastest way to access and service policies, view applications and policy documents, send Auto ID cards, and much more…

Items to be covered:

- Context menu shortcuts
- Application and Policy Documents preview
- Account Activity
- Templates
- Send Cards (AutoID Cards)

Client Entity Overview

Presenter: Nicolas Bourgery, Jose Rivera

Attend this session to gain a full understanding of the new layout and features of the Client Entity Overview, including managing data, account activity panel, submissions, and policies. This session is a must-have for anyone looking to acclimate users to the new interface.

Items to be covered:

- Sticky Notes
- Alerts
- Account Activity Panel
- Active Policies Panel, including Send Cards functionality
- Managing Items
- Managing Assignments
- Submissions
- Policies

TUESDAY, SEPTEMBER 26 – 3:15 – 4:15 PM

Byrnes Agency Case Study

Presenter: Jay Byrnes, Alexis Hussey, Robin Cordell

During this session, Byrnes Agency will discuss its use of the Nexsure Insurance Platform.

Actions in Nexsure

Presenter: TBD

This session will cover Actions, one of the most often used features within the Nexsure Insurance Platform. In this session, learn about the best practices for setting up, implementing, and managing Actions throughout the system. This session will include coverage of Action Plans, linked Actions, Action/Delivery connections, Alerts, and more.

Items to be covered:

- Setup

- Plans
- Linking
- Best practices
- List maintenance/governance
- Reporting
- Alerts

Extend Your Reach with Automation
Presenter: Greg Arnold

Nexsure provides a powerful communication extension to your overall agency strategy. Formatted outbound messages via phone, email, or text message trigger upon specific servicing events, providing a level of coverage and professionalism that is second to none. In this session, learn the system's capabilities, including event triggers, template construction, and finite usage. This session includes a real-world example with cancellations.

Items to be covered:
- General Overview
- Best Practice Reporting
- Past Due Reminders
- Example use case
- Servicing events covered
- Template construction and best practices
- Retail Agent
    - General Overview
    - E&O expiration notifications
    - End of Day notifications

WEDNESDAY, SEPTEMBER 27 – 9:45 – 10:30 AM

Cloud Update and Security Overview
Presenter: Mike Hollingsworth

This session will provide an update on the migration of the Nexsure Insurance Platform to the public cloud. We will also do a walk-through of the security features offered by Nexsure, including but not limited to single sign-on (SSO), login and password restrictions, MFA, user rights templates, access, and transaction logging, along with optional IP Filtering and Encrypted Email.

Overview of Workload Analysis and the Effort Quotient (EQ)
Presenter: Tom O'Neil

Gain insight into your most/least profitable customers and retail agents by leveraging Nexsure's Workload Analysis. As your employees are completing work in the system, Nexsure is keeping track of this effort's impact against the client's profitability. This session covers the Effort Quotient (EQ) metric, the reporting dashboards, and how to leverage reviews to decide on the direction of your workload balance.

Items to be covered:
- EQ methodology and formula
- Workload Analysis Dashboard
    - Time Slices, Trending, and Sorting
    - Filters
    - Client Analysis
    - Retail Agent workload
    - Employee workload
- Review process
    - Exclude outliers

Introduction to the Redesigned Carrier Entities

Presenter: Nicolas Bourgery

Attendees of this session will receive a complete overview of the newly redesigned Carrier Entity, including Statistical Dashboards, entity management, and commissions.

Items to be covered:

- Sticky Notes
- Alerts
- Account Activity Panel
- Dashboard Statistics
- Data Management
- Commission Defaults

WEDNESDAY, SEPTEMBER 27 – 10:45 – 11:30 AM

PMC Case Study

Presenter: Debi McAleer

During this session, PMC will discuss its use of the Nexsure Insurance Platform.

Reporting in the Nexsure Insurance Platform

Presenters: TBD

Details of this session will be available soon.

Introduction to the Redesigned Retail Agency Entities

Presenter: Nicolas Bourgery

Attendees of this session will receive a complete overview of the newly redesigned Retail Agency Entity, including Statistical Dashboards, entity management, and commissions.

Items to be covered:

- Sticky Notes
- Alerts
- Account Activity Panel
- Dashboard Statistics
- Entity Management
- Commissions
- Contracts, E&O and license management

WEDNESDAY, SEPTEMBER 27 – 12:30 – 1:15 PM

Synchrono Case Study

Presenter: Steve Hartman

During this session, Synchrono will discuss its use of the Nexsure Insurance Platform.

Overview of Lead Management and Web Forms

Presenter: Greg Arnold

This session is designed to show you how to get the most out of the pre-sales activity and begin tracking data in Nexsure through the opportunity process. Extend your reach and allow your customers and potential customers an avenue to touch base with your staff.

Items to be covered:

- Leads
    - Creation of a prospect
    - Lead forms
    - Lead import via Excel
    - Management of Leads
    - Promote lead to client/retail agent
    - Reporting
- Web Forms
    - Setup of forms
    - Implementing into a website
    - Leveraging a landing page for an email campaign
    - Receiving requests and resolving
    - Tracking via the Dashboard
    - Concept of Listeners

Extending Your Reach with the Redesigned Insured Portal

Presenters: Robin Cordell, Jose Rivera

Empower the insured with an intuitive, redesigned user experience optimized for quick adoption and mobile devices. Gain an understanding of the portal's capabilities and leverage a new, professional customer touchpoint.

Items to be covered:

- Overview of Capabilities
- Branding
- Security and managing users
- Controlling access
    - Policies
    - Documents and attachments
    - Certificates
- Proofs of Insurance
- Web Requests
- Submissions
- Payment Options

WEDNESDAY, SEPTEMBER 27 – 1:30 – 3:00 PM

Enhance Customer Experience with XDTI Partners

Presenter: Jose Rivera, Others TBA

Complement the power of the Nexsure Insurance Platform and further enhance customer experience with connections to third-party services to resolve complex business problems. This session covers several key integrations with trusted business partners and provides an overview of their capabilities and solutions.

Receivables in Nexsure

Presenter: David Shepherd

The details of this session will be available soon.

Actions in Nexsure

Presenters: TBD

This session will provide an overview of Deliveries in the Nexsure Insurance Platform.

Attachment Manager and Document Management

Presenters: Nicolas Bourgery

One of the most important elements of servicing is the ability to generate letters, proposals, and all manners of communication. Attend this session to learn the different types of templates, the library, and the usage of merge fields as well as the overall maintenance of the templates themselves. Several new features for this component have extended its workflow and bulk processing capabilities. This session covers an overview of the program, including basic document management features, inboxes, PDF manipulation, Actions, and scanning.

Items to be covered:

- Global Library
- Naming Conventions
- Attachment Manager install
- General Overview
- Drag & Drop
- Scanning
- Inboxes
- PDF manipulation
- Download Import