Guardian

SmartActivity

Keeping promises to clients—and yourself

It's important to focus your time on **smart** activities that will help you grow a successful and sustainable practice. Weekly success metrics have been set for you in the Foundations scorecard to help track results to corresponding **smart** activities. What makes an activity **smart**?

- Smart Activities are **simple.** They don't require years of experience or hard-to-achieve credentials, just determination.
- Smart Activities are **results-oriented**. When accomplished on a consistent basis, they add to your bottom line and the odds of building a successful practice.

Setting personal goals (and determining the level of income required to attain those goals) helps to associate the **qualitative** (what you want) with the **quantitative** (what it takes to get it).

SmartActivity	Results
New Referrals/Contacts	10
New Clients with Quick Facts	2
Appts Scheduled next 2 weeks	20
Kept Appointments	5
Apps Submitted	.5
Paid Cases	.5
Paid Premium	$1,250

Access your Foundations Scorecard from the GOL Dashboard.

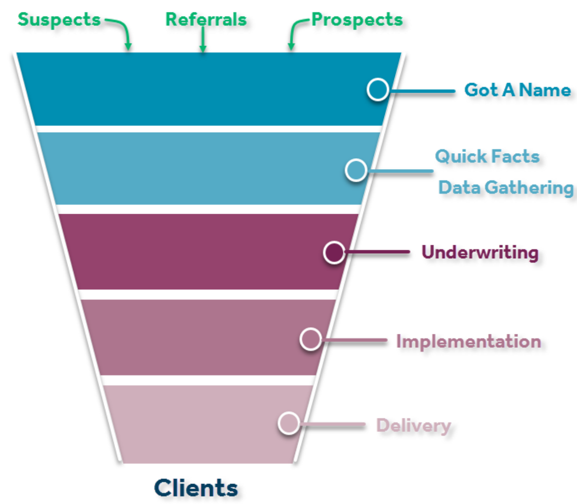
What is an Opportunity Pipeline?

The terms **Opportunity** and **Pipeline** are used interchangeably to describe the process of onboarding a new client.

As the relationship develops, your work with the client(s) can be defined by **stages**.

Client Onboarding

- Cultivate new clients using a process
- The process is a roadmap
- Prospecting yields Suspects, Referrals, Prospects
- Add new contacts to your pipeline/process
- Update each contact's current stage regularly
- No missed opportunities because you lost track
- Contacts may not go through every stage
- Stages do not have to be in order



As you continue working with the client, you may implement products or investments as part of the planning process. When you submit applications and/or open new accounts, you can estimate **premium**, **assets under management (AUM)** and project an **estimated close date.** This information is aggregated and displayed on the **SmartActivity Dashboard** to help you monitor your progress towards meeting your personal goals.

LBS Client Process

You will be using the **LBS Client Process*** with these stages:

- Quick Facts
- Protection/Underwriting
- Cash Flow/Retirement Analysis
- Investment/Underwriting
- Delivery/Partnership (This is an opportunity to ask for referrals.)
- Case Placed (Client has accepted the policy and premium paid or account opened with AUM received.)
- Not Moving Forward (Sale was lost.)
- Parked (Contact said "not now" but would like to be called again or you see future potential to re-visit.)

* Your firm may use a specific process that is similar, although the stage names and order may vary slightly.

Update your pipeline frequently:

- Check each contact's current stage – Is the contact further along in the process?
- Add Product – If insurance, add Premium. If annuity or PAS, add AUM amount.
- A contact may be added to the pipeline multiple times for multiple products.
- Update the estimated close date so your end-of-month projections are accurate.

Introducing the SmartActivity App

The **SmartActivity App** is your epicenter for goal setting and activity management. The following detailed instructions show how to use this powerful tool in your practice.

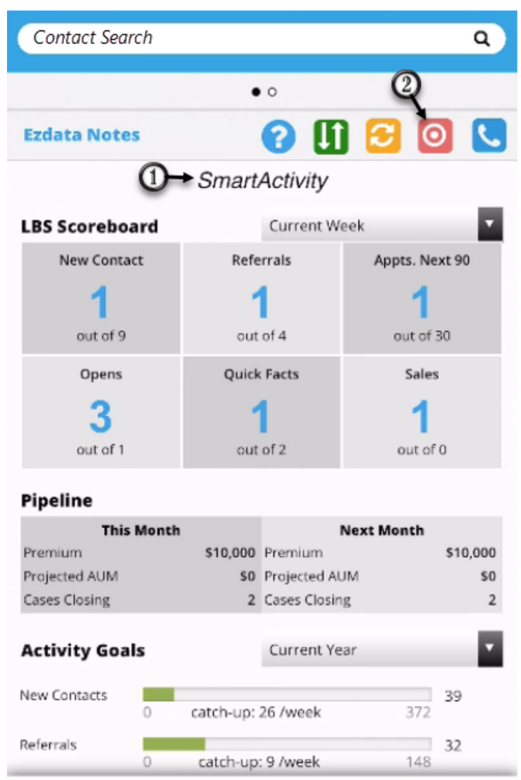
Let's begin by setting up access:

	Search for **GLIC SOA** in the Store. Select **GET** and **INSTALL**.	Guardian SOA
	In the **Chrome** browser, go to **SOA.GLIC.COM**. Tap **Menu**. Select **Add to Home Screen**. You may change the name to **SOA**.	SOA
USER ID GOL ID PASSWORD	Launch the app on your device. Enter your **GOL credentials** to login. Tap **Submit** to login to **SmartOffice Anywhere**.	submit

Start Here—Set Your Personal Goals

1. You'll land on the ***SmartActivity*** Dashboard.

2. Tap the target button to set your goals.



3. This is the **Performance Goals** screen. The default weekly activity ratio reflects typical industry standards. The default ratio should be edited only if your experience is different and your manager concurs.

4. In this section, set the number of **Weeks** you expect to work in the year, allowing for vacations, holidays, etc.

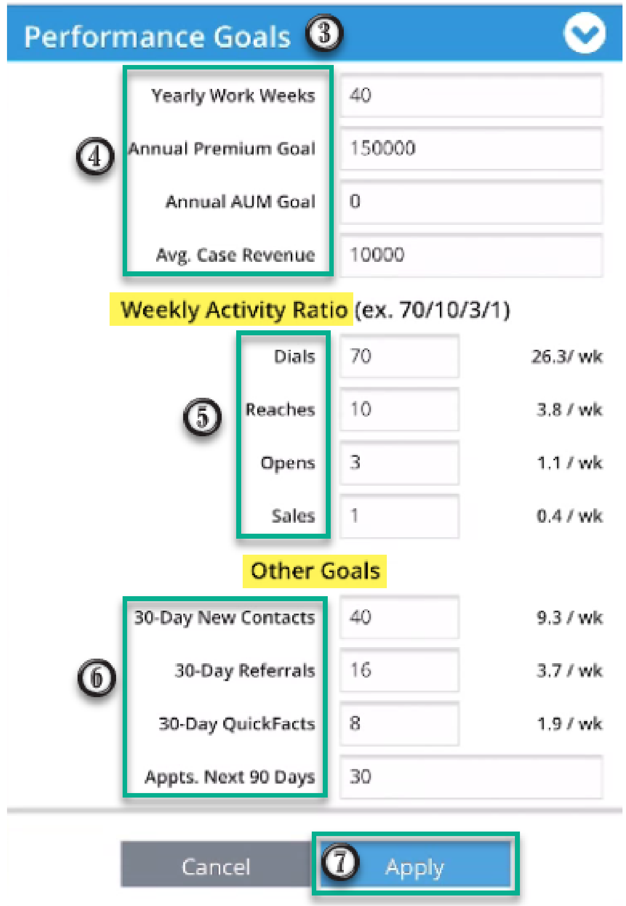
   Set a goal for **Annual Premium** and **AUM**

   What you expect your **Average Case Revenue** to be

5. Next, set your **Weekly Activity Ratio**, for example, if you make 70 calls, you expect to have 10 reaches, 3 opens and close 1 sale.

6. In **Other Goals**, set your goals for the number of new contacts and the number of referrals you can obtain in each 30-day period and the number of appointments in the next 90 days.

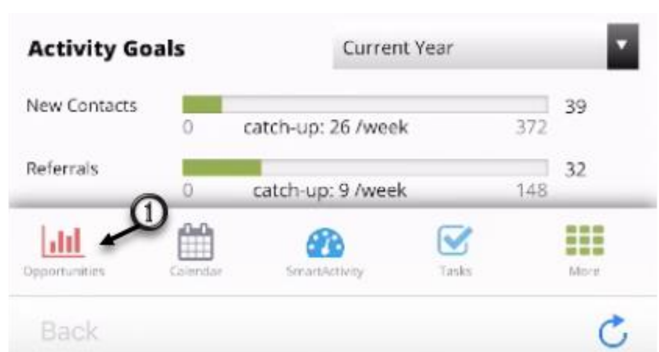
7. Tap **Apply** to accept the goals. Return to dashboard.



8. To update your goals, tap **Refresh** .

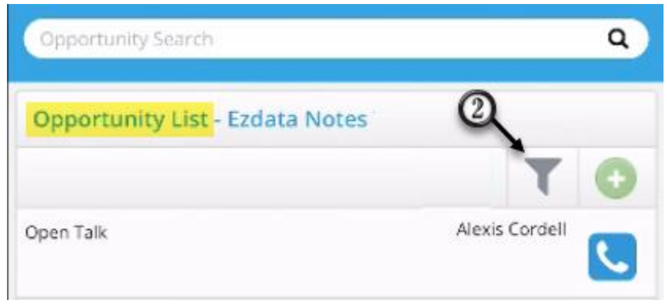
Set Opportunity List Defaults

1. Tap **Opportunities** in the bottom tool bar.



2. The **Opportunity List** is displayed.

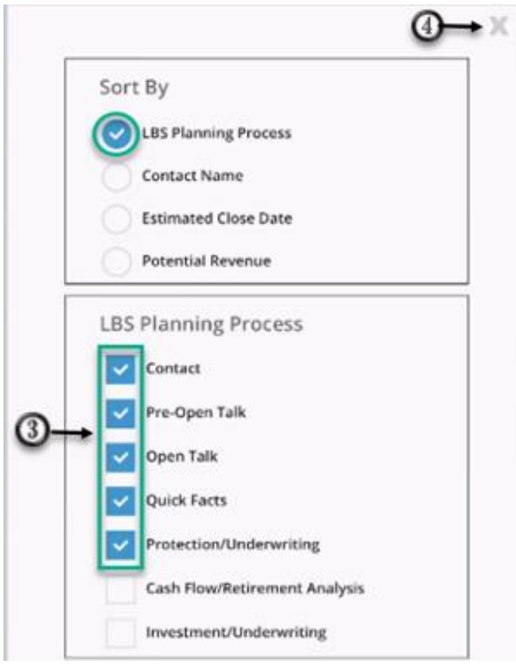
   Select the funnel  to set defaults.



3. Select the defaults for sorting, displaying and filtering the **Opportunity List.**

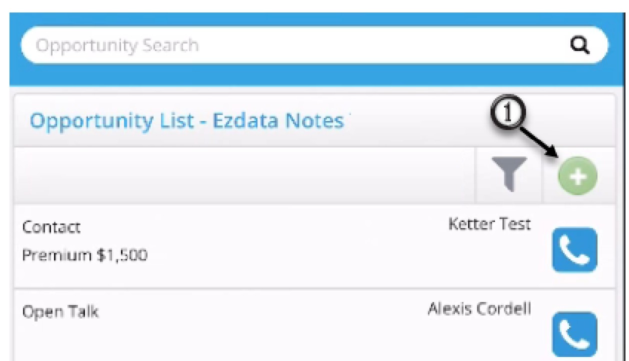
   Best practice is to select all stages to start, until your Opportunity pipeline expands. You can always tap the funnel to change the defaults.

4. Tap **X** in the top right corner to save selections and return to the **Opportunity List**.



Add a New Contact/Opportunity

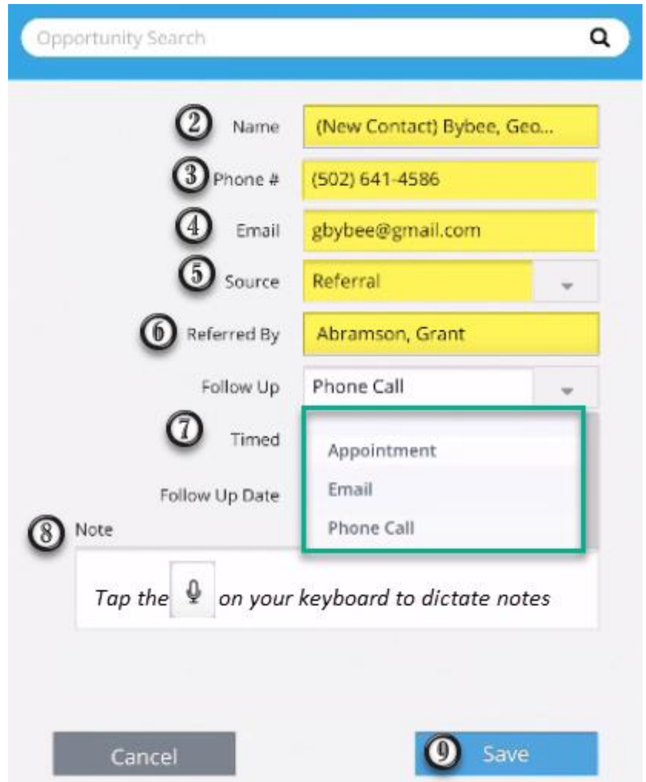
Add new contacts from the Opportunity List



1. Tap the  button to add a new contact/opportunity.

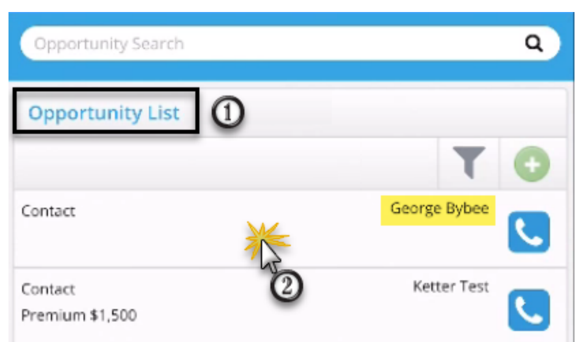
2. Add the new contact's **Name.**
3. Add the best **Phone #** to reach the contact.
4. Add **Email** address.
5. Select the **Source** of the new contact.
6. Add the person who gave you the referral. The **Referred By** should already be a contact in SmartOffice.
7. Creating a Follow Up activity is optional:
    a. An Appointment is a **Timed** activity
    b. An Email or Phone Call is an **Un-Timed** activity
    c. Insert the date you would like to **Follow Up**
8. Type or dictate any **Notes** relevant to this contact.
9. Tap **Save** to add the new contact/opportunity*.

* The new contact is automatically added to the Opportunity Pipeline.

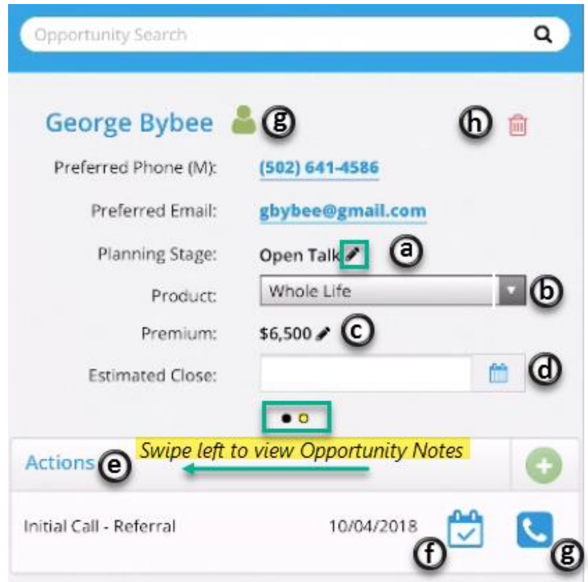


Manage Your Pipeline

1. After saving, the **Opportunity List** will display.
2. Tap anywhere on the line of the Contact/Opportunity you wish to edit to **Open an Opportunity.**



3. On this screen, update or edit several aspects of the Contact/Opportunity:
   a. Tap the button to select the **Planning Stage**.
   b. Tap the arrow to select the **Product.**
   c. Edit the **Premium** or **AUM** (based on product selected).
   d. Tap the button to add the **Estimated Close**. Tap **Set**.
   e. Swipe left on **Actions** bar to view **Opportunity Notes**.
      Opportunity Notes are also added to the **SmartPad**.
   f. To mark the action as completed, tap the button.
   g. Dial the contact by tapping the or the button.
   h. To delete the opportunity, tap the button.



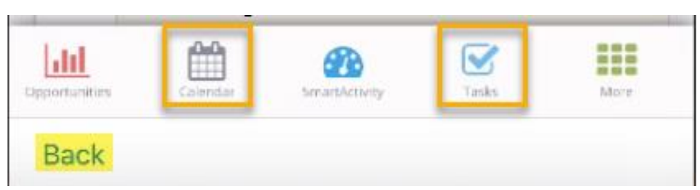
- Moving a contact to any stage after **Open Talk** counts as an **Open Talk** on the activity dashboard.
- An Open Talk will only **count once**.
- A **Quick Facts** *is not* counted by the movement of a stage.
- A **Quick Facts** *is* counted by checking a box when marking an appointment "Done".

The SmartOffice Calendar

The SmartOffice calendar and the Outlook (OWA) calendar can be synced. We recommend a two-way sync so that activities you place in either calendar will sync to the other calendar. The sync runs every 5-10 minutes. To request the calendar sync, email SmartOffice@glic.com.

Access to the Calendar and Tasks is always available from the bottom tool bar.

1. Tap the Calendar button to view timed activities.



2. Tap the Tasks button to view un-timed activities.

Note: Un-timed activities auto-move to current day until "Done".

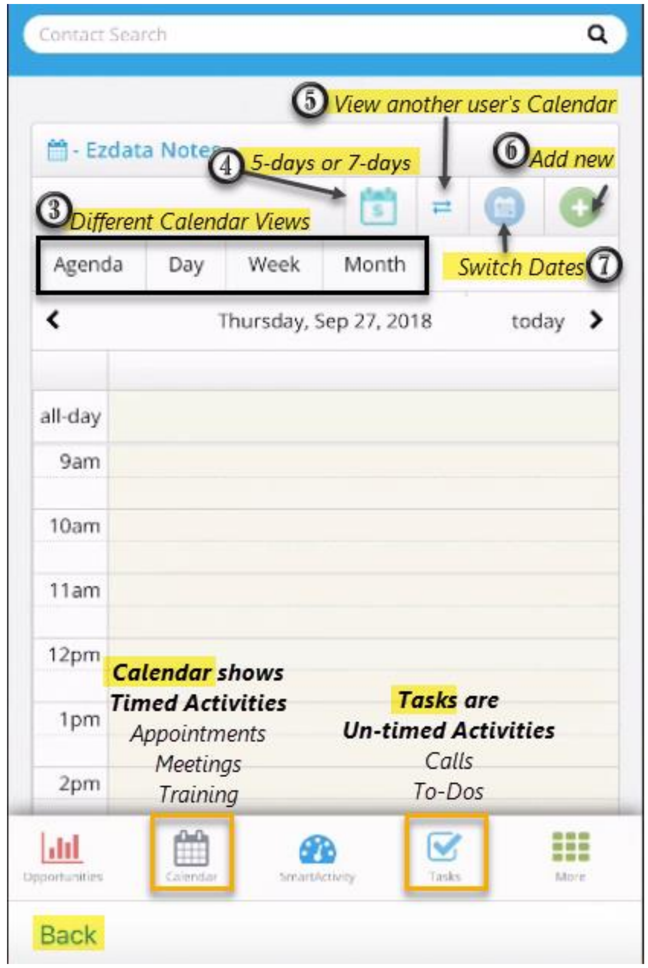
3. **Day** or **Agenda** is easier to view on a mobile device.

4. Change to the work-week (**5** days) or week (**7** days).

5. Easily **Switch** to check another user's calendar.

6. **Add new** activity—timed or un-timed.

7. Default view is **today** but you can **Switch Dates**.



The **Calendar** displays **Timed** Activities:

- Appointments
- Meetings
- Training sessions

Tasks displays your Calls and To-Dos...activities that are **not at a specific time** and that will "roll over" to the current day each time you log in.

Schedule an Appointment

1. Tap to **Add New** activity (or task).

2. Link the activity to a **Contact**.
Note: For Foundations scorecard, appointments must be linked.

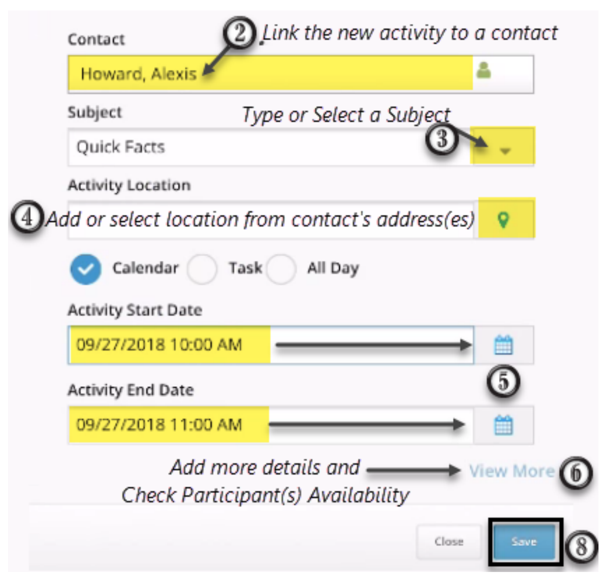
3. Type the **Subject** line or select one, if available.

4. Add a **Location** or select contact's address.

5. Select **Start Date/Time** and **End Date/Time**.

6. Tap **View More** to add **Description** and other details.

7. Type **Participants'** names. Red indicates "Busy".



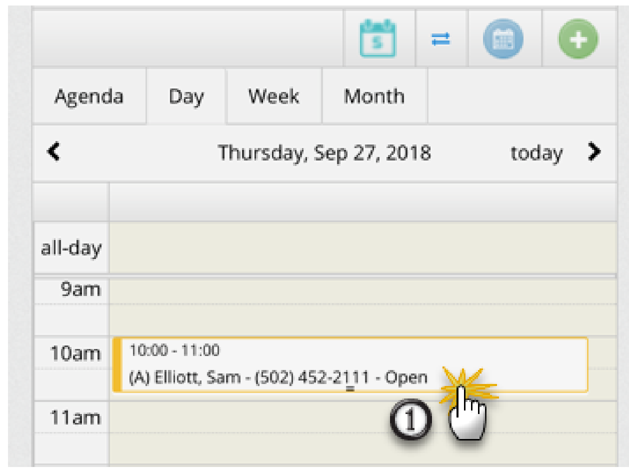
8. Tap **Save**.

Mark Activities "Done"

Timed Activities

Tap  in tool bar.

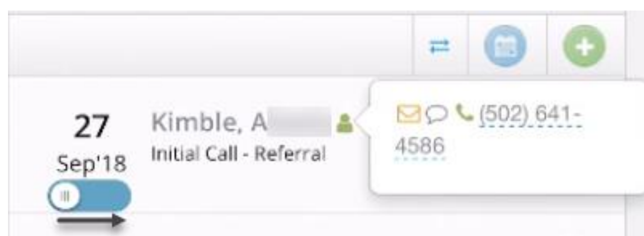
1. Tap the Appointment line to open.



Un-timed Tasks

Tap  in toolbar.

1. Slide  to the right.

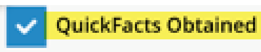


2. Was the **Contact Made**? or **Contact Not Made?** Outcome options differ based upon your selection.

3. Select the appropriate **Outcome**

4. Select **Outcome Options**

   Check this box for **QuickFacts Obtained***

   Counts as a QuickFacts on the *SmartActivity dashboard

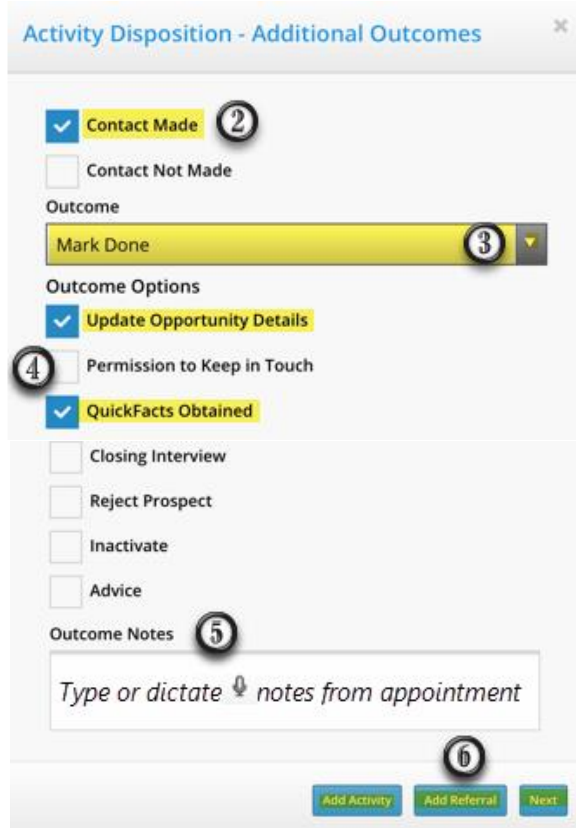
   Registered reps check this box 

 to indicate investment advice was provided in the appointment or call. If so, indicate the type of advice and add notes specific to that advice.

5. Type or dictate your **Outcome Notes**

6. To continue, select from:

   a. **Add Activity**
   b. **Add Referral**
   c. **Next** to continue



With a strong purpose, backed by a measurable income goal, you can **determine the level of activity** needed to **not only meet but exceed** your goals. Critical speed can be achieved by **the number of people you see** to create new opportunities.

We Can Help!

For **browser, access or technical issues**, call the Support Line at **1-800-499-8820**.

For **specific tasks or questions** about using SmartOffice or SmartOffice Anywhere, email SmartOffice@glic.com.

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