

BIS Spring Seminars

Bringing Sales Opportunities to your Business

We are delighted to announce our series of **Nationwide Seminars** taking place from 24th March to 2nd April. We really hope you can join us at one of the 10 locations across the country.

During our last series of seminars we launched some fantastic new features such as the Financial Express ToolKit and the Clarus Risk Attitude Questionnaires. All of which have been extremely well received.

This time around the theme of our seminars is "**Bringing Sales Opportunities to your Business**". We will show you how to use our systems for:

- **Automated Sales Opportunities in OmniBroker**
- **Database mining coupled with Mail Merge and Email Merge**
- **Client Presentation Suite**

We are delighted to be joined by two of our partners, **WebQuote** and **Zurich Life**.



WebQuote, who provide online protection quotes to a large number of brokers websites, have recently developed some excellent new support tools which, if you don't already have a website, may inspire you into getting one. And for those that already have a website, WebQuote have some interesting hints and tips to make it and your business more productive.



Investment opportunities for your customers

As bank and cash returns continue to be at all time lows, for customers seeking higher returns, what are the alternatives?

- How do you manage the customer transition from 'risk-free' savings to an acceptance that some risk can be very rewarding.
- How do manage the conversation about the tax benefits of investment bonds v's your traditional bank savings account?
- What are the most suitable solutions for your typical 'cash' saver?

Zurich will take you through the answers and help you frame the investment story with your customers.

Seminar Dates and Locations

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|------------------|---------------|--|-------------------------------|
| Mon 24th March | 14.30 - 16.00 | Dundalk - Crowne Plaza Hotel | Register Here |
| Tues 25th March | 09.30 - 11.00 | Letterkenny - Radisson Blu Hotel | Register Here |
| Tues 25th March | 14.30 - 16.00 | Sligo - The Sligo Park Hotel | Register Here |
| Wed 26th March | 09.30 - 11.00 | Galway - The Pillo Hotel | Register Here |
| Wed 26th March | 14.30 - 16.00 | Limerick - The Clarion Hotel | Register Here |
| Thurs 27th March | 09.30 - 11.00 | Cork - The Clarion Hotel | Register Here |
| Thurs 27th March | 14.30 - 16.00 | Waterford - The Granville Hotel | Register Here |
| Mon 31st March | 14.30 - 16.00 | Dublin North - Carlton Dublin Airport | Register Here |
| Tues 1st April | 09.30 - 11.00 | Athlone - Radisson Blu Hotel | Register Here |
| Wed 2nd April | 14.30 - 16.00 | Dublin South - Stillorgan Park Hotel | Register Here |

Seminar Agenda

Tea / Coffee and Biscuits on Arrival

40 mins - **BIS - Sales Opportunities and System Enhancements**

15 mins - **WebQuote - Bringing your business online**

20 mins - **Zurich Life - Investment Opportunities for your customers**

We will also be showing you some enhancements to areas on the systems such as:

OmniBrokerDocs - now we have a cutting edge document management system available, which integrates with OmniBroker and Microsoft Office (including Outlook emails), so all your clients details, policy information and documents can be accessed from one place.

Commissions Tool - OmniBrokerPlus now makes it easier to track your commissions

Statement of Suitability Templates - We have made some changes to the Statement of Suitability Templates which we think you'll really like. This gives the process of generating SOS letters more structure in line with CPC requirements.

Future Plans - we will also talk about whats in the pipeline in terms of development and what you can expect to see coming on line over the coming months

If you are unsure about anything, or have any questions please do not hesitate in contacting us.

We look forward to seeing you on the day.

Yours Sincerely,

The Team at BIS

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To find out details on more
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