

### **Three Week Agency in a Box Rollout Plan**

The iBoomerang Agency in a Box rollout plan is designed to clarify and streamline the Agency in a Box setup process. By following the rollout plan, you will **retain your priority position in line** as we prepare your Web site and tools. **You must commit to this process!** It will ensure timely activation of your Agency in a Box site and will allow you to get the most out of your iBoomerang products.

While iBoomerang will set up your Agency in a Box and provide ongoing support and advice even after your site is live, your agency administration must still play an active role in the setup and implementation of your iBoomerang tools.

### **PRELIMINARY PROCESS**

**Discussion of appropriate tools package for agency.**

**Review Agency in a Box billing process.**

*\*Billing will begin once the site goes live. Billing will occur on the 28<sup>th</sup> of every month via the ACH billing system. All payments are due by the 10<sup>th</sup> (12-13 days later) of the following month.*

**Sign iBoomerang contract**

**Sign ACH contract.**

*\*Must be returned before development will begin.*

**Sign or provide insurance contracts.**

**iBoomerang-Agency payment discussion.**

Coordinate payment plan.

*\*It is recommended that Agency Owner/Admin sets default agent status to "Pending" until agent has purchased iBoomerang tools. This will simplify the payment process and ensures the agency will not be charged for IT.*

**Agency-Agent payment discussion.**

### **WEEK ONE**

**Administrative staff attend iBoomerang Training.**

**Set up administrative tools. Development**

Web Conference Tool.

Landing Page.

E-mail Template Tool.

Volume Marketing Tool.

Dynamic Event Calendar.

**Determine agency domain name. Development/Design**

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**Establish, attend weekly meeting on Monday or Friday.**

**Assign in-house contact (provide iBoomerang with contact info).** *Development/Design*

*\*The contact is preferably administrative personnel with basic level of computer self-sufficiency (can upload files, perform general site maintenance tasks).*

**Gather general agency information.** *Development/Design*

Lay out agency hierarchy (to determine site accessibility).

**Gather list of users/agents (Excel sheet provided by iBoomerang).** *Development/Design*

Provide user information. *Development*

**Carriers must be determined.**

Set commission levels.

Upload PDFs, brochures, etc.

*\*Agency staff will be responsible for providing, uploading materials.*

**Gather logos, colors, previous Web sites, other printed materials for design (4-10 days).** *Design*

## **WEEK TWO**

**Web site layout/design approval.** *Design*

**Construction of site (4-10 days).** *Development*

## **WEEK THREE**

**Approval of site.**

**Orientations:**

Agency Admin

Owner (Web site, Back Office, administration area)

Agency Managers (Web site, Back Office, downline area)

**Develop training calendar.**

Agency use of iBoomerang Web Tools Certification program.

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