



The NextConcierge On-Boarding Process Overview and Description

As of July 18, 2018

Overview

Congratulations. You've invested in NextAgency to help you save time, money and clients. To get the most out of the system, you'll want your current agency data imported into NextBroker. Good news: we make this easy with NextConcierge — our fast and trustworthy on-boarding service.

In the NextConcierge process, you provide us with your agency data and we upload it into NextBroker. Both of us have important roles to play. This document describes our mutual commitments and responsibilities. (There is a separate NextConcierge process for NextHR).

What to Expect

Once you join NextAgency we schedule a welcome call. During this talk we'll help you decide if you want to use NextConcierge. Doing so is voluntary. If you choose to use NextConcierge, we'll review your data, discuss the NextConcierge process, and agree on a timeline.

NextConcierge usually takes four-to-six weeks. However, there's no way to be sure how long *your* on-boarding process will take. Much depends on the quality and organization of your data and how quickly you can deliver your data to us.

There are four steps in the NextConcierge process:

1. **Gather.** You gather and collect your data.
2. **Prepare & Share.** You organize your data and deliver it to us, usually through Sync.com — a HIPAA compliant, shared storage service similar to Dropbox.
3. **Map & Import.** We determine where your data goes in NextBroker and get it there.
4. **Sign-off.** You tell us the NextConcierge process has been completed to your satisfaction.

Please note, the NextConcierge process is used to get your current agency data into NextBroker. There is a separate on-boarding arrangement for getting your clients' information into NextHR.

Step-by-Step

What follows is a more detailed explanation for each step in the NextConcierge process. Your concierge will send you regular updates, so you'll know where things stand throughout the process.

1. Gather

Most insurance agencies have a lot of data tucked away in file cabinets, Excel spreadsheets, online file programs, other agency management systems, scraps of paper or elsewhere. The first step is for you to gather all your data. This is a great opportunity to do some house cleaning. You may find some of your data is outdated or unnecessary.

Think about what information you really need and to make sure what you send is accurate. We import what you send us – if what you send us is wrong, what we import into NextBroker for you will be wrong, too.

2. Prepare & Share

Your data needs to be in digital form to be uploaded into NextBroker. Excel, Word and PDF files are already digital. If you are moving to NextBroker from another agency management system you may be able to export your data into spreadsheets. Scanning documents can convert them into digital form.

You will need to make sure we can tell the kind of data you are sending us. For example, a list of names may be a roster of individual clients, a group's employees, vendor contacts or contacts at a carrier. You may need to classify what the data is if it's not apparent. Usually this is as simple as adding a title to the document or adding a column to a spreadsheet.

Data on spreadsheets get into NextBroker the fastest. We have templates with predefined fields you can use to organize your data. If you have folders and files on a shared server we may be able to move them over as a unit, preserving your folder structure.

Before sharing your data, you and your concierge will review what you've prepared to make sure we understand what you're sending us. When your data is ready, we'll provide you with a private "room" in a cloud-based data sharing service we use called Sync.com. It's very much like Dropbox, but Sync.com uses end-to-end encryption. This makes it safe for HIPAA protected information. Your NextConcierge will show you how to use it.

Sync.com is very secure. But if you'd rather send us your data on a thumb drive, that works, too. If the drive is encrypted, please let your concierge know the password.

Please note, we cannot start our part of the on-boarding process until you've completed these first two steps. Consequently, how long your NextConcierge process will take is determined in large part by how quickly your agency can complete the Gather, Prepare & Share steps.

3. Map & Import

Once we receive your organized data, we determine where it goes in NextBroker. Your concierge will contact you (or your designee) with any questions. If your current data includes fields that NextBroker doesn't include by default, don't worry. We'll create custom fields to find a home for that data. Your concierge will also send you regular updates on our progress, so you know where things stand throughout the process.

4. Sign-off

Our goal with NextConcierge is to quickly and accurately import your data into NextBroker. We review our work, but you're the final judge of how we've done.

We'll notify you when we've completed the Map & Import step. You'll have a full week to review our work. If there's something wrong, let us know and we'll do our best to fix it. You'll have another three business days to confirm that we did. (These together are the "Review Periods").

When you are satisfied your data is in the system, you'll sign-off on our work and the NextConcierge process will be complete. The NextConcierge process will be deemed complete if we do not hear from you within the Review Periods.

Please note, while determining that your data is in NextBroker, you may come up with requests for tweaks to the software. We're eager to hear your suggestions. NextBroker incorporates many user suggestions for features and functions. However, our addressing those suggestions are outside the NextConcierge process. In this Sign-off step, the only question is whether your data is in NextBroker.

AND NOW A WORD FROM OUR LAWYERS

NextConcierge is an optional service offered by Take 44, Inc., the company behind NextAgency. You are under no obligation to use NextConcierge. After you purchase NextAgency you may:

- a. **Opt-in to the NextConcierge process in your first two months after purchasing NextAgency.** If you are paying:
 - i. a **monthly license** fee, we will bill you the difference between the license fees you've already paid and the NextConcierge fee of \$400 for members of the National Association of Health Underwriters; \$500 for non-NAHU members. You will make no further license fee payments to us until you accept our work as described in the Sign-off step, above. You'll resume making license fee payments once your NextConcierge process is complete.
 - ii. an **annual license** fee, we will extend your renewal date by the length of time from your opting-in to NextConcierge and your approval of the service as described in the Sign-off step, above.
- b. **If you opt-out of the NextConcierge service,** you'll continue paying your licensing fee. If **after the first two months** following your purchase of NextAgency you notify us you are opting-in to NextConcierge, we will bill you \$400 if you are a NAHU member (\$500 if you are not a NAHU member) for the concierge service and continue to charge you the license fee you've selected.

Regardless of when you opt-in to the NextConcierge service:

1. Any requests for data transfer after your sign-off will be treated as a request for custom services and may be subject to an additional charge at the then current rate. (As of July 2018, the rate for custom service is \$75 per hour).

2. In the unlikely event of a dispute over whether we have successfully completed the NextConcierge process, you and we agree to work in good faith to reach a mutually amenable solution. In the unlikely event we reach an impasse we may: stop further on-boarding of your data; delete previously on-boarded data from our servers; return to you any physical material you provided to us; and terminate your NextAgency subscription. You will owe no additional fees but will not receive a refund of any fees paid prior to this termination.

And Yet Another Word, This One from Our Trainers

We've tried to make NextAgency as straightforward and intuitive as possible and we've built a knowledge base of manuals and videos to answer your questions. However, as with any software, training can shorten the learning curve. Whether or not you use the NextConcierge service, we provide you with five training sessions of up to an hour for free. You may purchase additional one-hour training sessions at \$75 per session. All training sessions are scheduled at our mutual convenience. And you determine can choose the topics covered.

We look forward to working with you.