



## Training & Consulting

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### Brokerage General Agencies



Now that you have implemented SmartOffice and have a working knowledge of its capabilities, you might be wondering what more it can do for your organization.

In our 30+ years of helping customers achieve success, we have found a common thread among those customers who maximize SmartOffice's value in their organizations.

These customers periodically assess their use of SmartOffice to take advantage of new or enhanced functionality based on their changing business needs.

**This is where SmartOffice Training can help.**

# Hitting Your Targets

Our team of seasoned trainers has helped thousands of customers get the most out of their SmartOffice investment. They can do the same for you! Read on to explore the custom training and consulting programs to help your organization meet its goals and unique targets.

## Practice Assessment Consultation | \$600

**Objective:** Through detailed consultation with you and your staff, we will conduct an assessment of your practice and your current use of SmartOffice. We will then provide an action plan with recommendations to optimize your use of SmartOffice.

### What's Included:

Detailed consultative session to learn your unique business requirements and objectives. This includes:

- Reviewing your firm's current use of SmartOffice.
  - Listening to your current user experience to determine areas of success and areas where there are obstacles to success.
  - Revisiting current workflows and identifying ways to improve them to accommodate any product or business requirement changes.
  - Understanding your firm's goals and growth plans.
- Assessment of your current state and your desired future state, along with our findings and recommendations to ensure that our efforts are aligned to help you reach that desired future state.
- Suggested plan of action, which may include additional training and consulting.



## Build Your Own Training | \$200

**Objective:** If you already know where you would like to focus training efforts, we will work with you to build a custom training program based upon your unique business requirements. This training option provides superior flexibility in session content and scheduling and works well for offices large and small.

To learn more, please contact  
Training Manager Philomena DiCicco  
at (626) 585-3505 ext. 7367 or  
[smartofficetraining@zinnia.com](mailto:smartofficetraining@zinnia.com).