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 28th of every month via the ACH billing system. All payments are due by the 10th (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
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.