

# Self-Evaluation Guide

Provided by **K■Phowl** consulting

**Name:** Tom Selleck

**Department:** President

Please use this guide to determine your own system capabilities. Check the box that best represents your own level of accomplishment with AfW, Microsoft and other system tools in use in your agency.

**1 is low and 5 is high**

**1 2 3 4 5**

**1 is low and 5 is high**

**1 2 3 4 5**

<p><b>System Administration</b>      <b>N/A</b>    <input checked="" type="checkbox"/></p> <ul style="list-style-type: none"> <li>Backup                    <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Tape Rotation           <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>DBCC Results           <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Test Restores           <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>AntiVirus Software    <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Transfer Manager       <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Training Resources     <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Operating Systems     <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>WebQuest               <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>WebBoard                <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> </ul>	<p><b>Service</b>                    <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>New Business           <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Renewal                   <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Endorsements           <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Copy Policy              <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Rewrites                  <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Cancellations           <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Submissions             <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Submission Response   <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Multiple Entity         <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Quick View               <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>
<p><b>Accounting</b>              <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Receipts                  <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Disbursements          <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Journal Entries          <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Bank Rec                  <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Daily Process           <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Period Close             <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Accounts Current       <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Producer Payable       <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Direct Bill               <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>	<p><b>Billing</b>                    <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Standard Bill           <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Endorsements           <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Installment              <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Cash Endorse / Install <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Inst Endorse / Install <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Cancellation           <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Fees                       <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Corrections             <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Reversal                  <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>
<p><b>Agency Wide</b>           <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Activities                <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Attachments             <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Contact Book            <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Launch Button           <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Suspense                 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Column Sizing          <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>	<p><b>Forms</b>                     <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Certificates            <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Evidence (EPI)         <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Lost Policy (LPR)      <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Auto ID Cards           <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Binder                    <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Policy Memo             <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>
<p><b>Claims</b>                   <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Initial Claim Entry     <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Payments                 <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Reserve/Expenses       <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Activities                <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Notes                     <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Closing                  <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>	<p><b>Marketing</b>                <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Target Lists             <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Import LeadLists       <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Counts                    <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Campaigns              <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Reports                  <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Merging to Excel       <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> </ul>
<p><b>Reports – Accounting</b>   <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Financials               <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Unbilled Policies       <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Unreplaced Binder      <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Production – both      <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Customer Aged A/R     <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Payables                 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Exporting to Excel      <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>	<p><b>Reports – Service</b>       <b>N/A</b>    <input type="checkbox"/></p> <ul style="list-style-type: none"> <li>Expiration               <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Activities                <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Claims                    <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Submissions             <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Submission Response   <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></li> <li>Cert Holders            <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> <li>Exporting to Excel      <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></li> </ul>

# Self-Evaluation Guide

Provided by **K■P**nowlin consulting

**Name:** Tom Selleck

**Department:** President

Please use this guide to determine your own system capabilities. Check the box that best represents your own level of accomplishment with AfW, Microsoft and other system tools in use in your agency.

**1 is low and 5 is high**

**1 2 3 4 5**

**1 is low and 5 is high**

**1 2 3 4 5**

<p><b>Excel</b></p> <p style="text-align: center;"><b>N/A</b> <input type="checkbox"/></p> <p>The Basics <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Pivot Tables <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Sorting <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>SubTotals <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Text to Columns <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Concatenate <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Macros <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Macros to Reports <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Formatting <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Custom Toolbars <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Hyperlinks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Paste Special/Link <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Drawing Tools/Graphic <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Shortcuts <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>	<p><b>DataPorter –</b></p> <p style="text-align: center;"><b>N/A</b> <input checked="" type="checkbox"/></p> <p>Merge Field Lists <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Form Letters <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Schedules <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Mini-Reporting <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Merge w/Market <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <hr/> <p><b>PS4 Plus</b></p> <p style="text-align: center;"><b>N/A</b> <input type="checkbox"/></p> <p>Setup <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Submissions <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>Risk Analysis <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>Proposals <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Integration w/AfW <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>
<p><b>Word</b></p> <p style="text-align: center;"><b>N/A</b> <input type="checkbox"/></p> <p>The Basics <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Formatting <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>AutoCorrect/Text <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Tables <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Bookmarks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Cross-references <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Styles <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Custom Toolbars <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Hyperlinks <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Drawing Tools/Graphic <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Macros <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Shortcuts <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>	<p><b>Rating</b></p> <p style="text-align: center;"><b>N/A</b> <input type="checkbox"/></p> <p>Quoting <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>Storing/Recalling <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>Integrating w/AfW <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>Company Sites <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <hr/> <p><b>Printing Options</b></p> <p style="text-align: center;"><b>N/A</b> <input checked="" type="checkbox"/></p> <p>FinePrint <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>PdfFactory <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Adobe <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Network/Local Printer <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>UniPrint <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>
<p><b>Outlook</b></p> <p style="text-align: center;"><b>N/A</b> <input type="checkbox"/></p> <p>Calendar <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>Contacts <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>Email <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>Notes <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Tasks <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Categories <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Meeting Invitations <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>Importing <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>Proper Filing <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Moving any item <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>	<p><b>Generic Items</b></p> <p>Basic Navigation <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>Remote Access <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Company Sites <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>Intranets <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>SilverPlume <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Sage <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Customer Access <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>Imaging/Scanning <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>TransactNOW <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>DataExporter <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p>

**Comments / Special Requests:** *(Type in the box below. It will create additional pages if needed.)*

I want all staff members to be more proficient with the parts of the Microsoft Office Suite. My own skills need improvement and I want to participate in the sessions.

<b>Employee Name</b>	<b>Position Use selection from drop down list.</b>	<b>Position Explanation - if needed or comments.</b>
Mary McIntyre	Accounting	
John Melton	Accounting	
Kari Martin	Commercial Lines	
Lori Greene	Commercial Lines	
Jane Krykowski	Commercial Lines	Jane will be on maternity leave starting in 5 weeks. When she returns, she will be working from home 2 days a week. We need guidance on how to make this work.
Mark Friedman	Commercial Lines	
Katy Klicker	Commercial Lines	
Bridget Jones	Commercial Lines	
Jeff Cain	Commercial Lines	Jeff is still in school and works only in the afternoons Monday - Thursday and is here all day on Friday.
Dick Clark	Commercial Lines	
Pat Moran	Commercial Lines	
<b>Rick Rynes</b>	<b>Commercial Lines Department Manager</b>	
Barb Taylor	Personal Lines	
Beverly Burgess	Personal Lines	
Lane Bryant	Personal Lines	
Lou Rawls	Personal Lines	Lou will be retiring at the end of next year. We want to make sure her knowledge is not lost when that happens.
Juli Newmar	Personal Lines	
Patti LaBelle	Personal Lines	
<b>Roy Rynes</b>	<b>Personal Lines Department Manager</b>	
<b>Tom Selleck</b>	<b>President</b>	
Cher Mansoni	Receptionist	Primary Responsibility is Reception, but she is licensed and does Personal Lines service when she is available.
Brad Bowden	System Administrator	
Sue Lefflor	System Administrator	Sue is also the Microsoft specialist on staff. She helps with Form Letters as well as Schedules, Proposals and Summaries.









## Employee

## Comment

**Tom Selleck**

I want all staff members to be more proficient with the parts of the Microsoft Office Suite. My own skills need improvement and I want to participate in the sessions.

**Kari Martin**

With my current Word and Excel skills, I can "get by", but I want to be able to do more with the information my customers give me. I want to get to a point where I feel like I am giving the value added step on the presentations we make to prospects and our current customers.

**Rick Rynes**

I think I am pretty good at Word and Excel, but I think it is more that I don't know what I don't know. Even if you just show me what I am missing in their features, I will believe we have moved ahead. I need to be challenged. Show me what I can do with the canned reports we already have and how to make those reports show me more information.

**Roy Rynes**

Rick and I talked it over and figured out that most of our assessment choices were made because we didn't know any better. We want to be able to lead our staff members by example.

**Jane Krykowski**

While I am pretty good at Word, Excel is not part of my regular routine. I need to enhance my Word skills as much as I can since I am the one that works with the Form Letters and Schedules, Proposals and Summaries the most. I want to make them easier to work with.

**Lou Rawls**

Excel and PowerPoint are not important to me, but I work with Word a lot with Form Letters. This is where I want the most work. I work with Jane entering the new Form Letters and some on the Schedules, Proposals and Summaries, but they aren't really used in Personal Lines.

**Mark Friedman**

I am the backup for running reports in the Commercial Lines department. I have not been wildly successful in getting the information out of AfW and into Excel. I need to see some tips on how to do it.