

## Access Your Success

AccessPoint, Pinpoint's Learning Management System (LMS), is the #1 LMS in the insurance industry. AccessPoint enables clients to configure the system to their specific branding and learning requirements. AccessPoint is a scalable system designed to provide a complete solution for field sales force training and development. Standard features include support for client defined curriculum and learning tracks, competency management, detailed tracking and reporting, and comprehensive support for delivering blended learning.

In addition to standard e-learning system capabilities, Pinpoint's LMS supports a broad set of capabilities for delivering compliance training and certification, continuing education, sales best practices, product launches, scheduling live events and leadership messages.

Take a look at how you can **access your success** with AccessPoint centralized learning!

## Why AccessPoint

The AccessPoint LMS satisfies the following customer needs:

- Unsurpassed flexibility in the design and configuration of the LMS
- Complete outsourcing of all hard-ware, software and infrastructure
- Comprehensive, easy to use self administration capabilities
- Reporting console for real-time tracking and reporting of user activity
- Comprehensive compliance, continuing education and best practices capabilities
- Competency management solutions from The Covenant Group, LIMRA, LOMA, and National Underwriter

## Features Include

- Simple, intuitive user interface
- Seamless integration into client infrastructure
- Configured to client hierarchy
- Branded to client look and feel
- Real-time reporting of user activity
- SCORM conformant
- SEC 17a-4 compliant
- Live event creation, rostering and tracking
- Scalable to tens-of-thousands of users



	Due Date	Status	Date Complete
✓ REG Basics of Life Insurance	10/27/2010	Complete	09/03/2010
✓ REG Basics of Variable Annuities	10/27/2010	Complete	09/03/2010
REG Basics of Variable Life Insurance	10/27/2010	Incomplete	
✓ REG Universal Life Insurance	10/27/2010	Complete	09/03/2010
REG Life Insurance Planning	11/03/2010	Incomplete	
REG Business Planning	12/03/2010	Incomplete	
REG Estate Planning	12/23/2010	Incomplete	
REG Closing the Sale	01/23/2011	Incomplete	

  

	Due Date	Status	Date Complete
✓ REG Anti-Money Laundering	10/27/2010	Complete	09/03/2010
✓ REG Privacy and Security	10/27/2010	Complete	09/03/2010
REG Regulations Update	10/27/2010	Complete	09/03/2010

User Learning Track



## AccessPoint Features

### Feature

### Benefit

#### Configurable

Flexibility in design and function of the system; without the time and cost of customization

#### Distributed system accessible world-wide

Central administration of content and tracking activity for both field-based and home office users

#### SCORM conformant

Access to unlimited 3rd party training content

#### Real-time, robust reporting

Track user and organization progress in real-time

#### Comprehensive support for blended learning curriculums

Utilize best training mode—classroom, live webinar, on-demand—for each learning activity in the curriculum

#### SEC 17a-4 compliant

Meets SEC requirements for data storage and retrieval—with no additional costs or infrastructure

#### Unlimited scalability

Flexibility to add users/groups to the system as needed with no limitations

## Example Reports

Region: Blue Ridge Office: MD51-Baltimore WE Nicholas Joseph Disipio Staff: All

Course Type: Current Curriculum—(Courses Completed after July 31, 2009)

Courses: ABR/CCIR Training and Certification Course

Course Status: All

Select a Date Range: All

Format: HTML

[Run Report](#)

### Reporting Console

Real-time access to individual and group activity data across the entire organization's hierarchy through AccessPoint's powerful, easy to use reporting console

**Track Summary Report: Learning Track for Pre-Contract Agents**  
CALIFORNIA (9/2/2010)

Staff	User ID	First Name	Last Name	Enrollment Date	ABR/CCIR Training & Certification Course	Activity	New Agent Orientation	Products and Markets	Projecting and Referrals	Selling Quality of Life Insurance	Comp.
CAR-03 JAMES VUONG	personname@yahoo.com	Bernadette	VanHornum	02/01/2010	02/01/2010	02/01/2010	02/01/2010	02/01/2010	02/01/2010	02/01/2010	
CAR-03 JAMES VUONG	personname@yahoo.com	Thomas	Blake	02/01/2010	02/01/2010	02/01/2010	02/01/2010	02/01/2010	02/01/2010	02/01/2010	
CAR-03 JAMES VUONG	personname@yahoo.com	William	Deputy								
CAR-03 JAMES VUONG	personname@yahoo.com	Karen	Donnell								
CAR-03 JAMES VUONG	personname@yahoo.com	Feng	Wang	02/01/2010	02/01/2010	02/01/2010	02/01/2010				
CAR-03 JAMES VUONG	personname@yahoo.com	Mary	MacDonell								

### Track Summary Reports

Check status of specific user groups, such as new agents, against their prescribed learning curriculum

**Course Completion Report: Current Curriculum**  
ABR/CCIR Training and Certification Course (9/2/2010)

First Name	Last Name	User ID	Job Title	Agency	Status	Date Due	Completion Date
George	Lipert	personname@yahoo.com	Special Representative	MO51-0285 Burden Insurance Company	Incomplete	05/07/2011	
Lorella	James	personname@yahoo.com	Sales Agent	MO51-08 Lery G Heiler Jr	Incomplete	05/07/2011	
Barbara	Rodriguez	personname@yahoo.com	Special Representative	MO51-0285 Burden Insurance Company	Complete	06/09/2010	05/07/2010
Chen	Lu	personname@yahoo.com	Special Representative	MO51-0285 Burden Insurance Company	Incomplete	05/07/2011	
Patrice	Brown	personname@yahoo.com	Special Representative	MO51-0285 Burden Insurance Company	Incomplete	05/07/2011	
Kellan	Brown	personname@yahoo.com	Sales Agent	MO51-08 Lery G Heiler Jr	Complete	06/09/2010	05/07/2010
Katherine Ann	Cooper	personname@yahoo.com	Special Representative	MO51-0285 Burden Insurance Company	Incomplete	05/07/2011	
Michael	James	personname@yahoo.com	Sales Agent	MO51-0285 Burden Insurance Company	Incomplete	05/07/2011	

### Completion Reports

Check on the organization's status regarding key training initiatives such as the required product training or compliance certification

### My Progress

27% Complete

	Due Date	Status	Date Complete
<input checked="" type="checkbox"/> REQ Basics of Life Insurance	10/27/2010	Complete	<a href="#">Print Certificate</a> 09/03/2010
<input checked="" type="checkbox"/> REQ Basics of Variable Annuities	10/27/2010	Complete	<a href="#">Print Certificate</a> 09/03/2010
<input type="checkbox"/> REQ Basics of Variable Life Insurance	10/27/2010	Incomplete	<a href="#">Print Certificate</a>
<input checked="" type="checkbox"/> REQ Universal Life Insurance	10/27/2010	Complete	<a href="#">Print Certificate</a> 09/03/2010
<input type="checkbox"/> REQ Life Insurance Planning	11/23/2010	Incomplete	<a href="#">Print Certificate</a>
<input type="checkbox"/> REQ Business Planning	11/23/2010	Incomplete	<a href="#">Print Certificate</a>
<input type="checkbox"/> REQ Estate Planning	11/23/2010	Incomplete	<a href="#">Print Certificate</a>
<input type="checkbox"/> REQ Closing the Sale	11/23/2010	Incomplete	<a href="#">Print Certificate</a>

### Other

66% Complete

	Due Date	Status	Date Complete
<input checked="" type="checkbox"/> REQ Anti-Money Laundering	10/27/2010	Complete	<a href="#">Print Certificate</a> 09/03/2010
<input checked="" type="checkbox"/> REQ Privacy and Security	10/27/2010	Complete	<a href="#">Print Certificate</a> 09/03/2010
<input type="checkbox"/> REQ Regulations Update	10/27/2010	Incomplete	<a href="#">Print Certificate</a>

### User Transcripts

Access user transcripts to review individual status against training, compliance and other key training initiatives

