



Weekly Newsletter

February 26, 2010

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Dear Brent,

Once upon a time Xanatek offered a Webinar recap of our Tips of the Week. March 19, 2010 Xanatek will offer two Webinars at 10 AM and 3 PM EST for approximately one hour each. We will recap the tips of the week that have been released between now and then, including todays, with Q & A welcomed at the end of each Tip!

Tip of the Week!

Basic IMS Reports

If there is one thing that most agents are intimidated by when using IMS, it's how to run a report. I'm here to tell you it is easier than you think. We have a lot of basic reports built right into IMS. All you have to do is pick the one you want. Below is an easy example that you can follow to get an understanding of how to run a basic report and from there, the sky's the limit.

Orphan Report - This report is probably the most common and must lucrative. It will help you find marketing opportunities amongst your existing. The orphan report will allow you to find current clients that have at least one auto, but no home, or the reverse.

How To:

1. Open "Reports" from the Main Menu of IMS.
2. Look to the right hand side where you will find manila file folder icons.
3. Click the plus sign next to the "Policies" folder to open the list of pre-created report.
4. Double click to select the "Orphan Accounts".

This will open up the orphan report already filled out and created for you with the criteria of active clients that have at least one auto, but doesn't have home!

5. Look to the top of the screen and click "Report"

Note: If you'd like to run the reverse of this report simply change the word auto to read home and home to read auto.

Hints:

- Your reports will only be as good as the information you keep
- If you check the other reports found in the folders like the *Policies* folder in step 3 you will find other basic pre-built reports to play with
- You can add additional criteria to any report of ours and make it your own
- If you have a report that you plan to use more than once you can save them

Stay tuned next week for more information about adding your our criteria to an IMS Report.

Hartford Downloads

Greetings,

As you know, Xanatek has been actively trying to establish downloads with The Hartford. Due to internal changes in their system they have been unwilling to certify Xanatek for daily downloads.

WE NEED YOUR HELP!

If you represent Hartford - Please call and email these people to ask that Xanatek be added to the list of management system they will support. I believe a large quantity of phone calls and emails will help the process.

Brian.Dooney@thehartford.com
Jim.Rogers2@thehartford.com

Personal Lines Marketing 860 620 6848

Thanks,
Brent Sheppard

Xanatek User Group Meetings

Xanatek is hosting several user group meetings starting March 25, 2010 at the Hotel Carlisle in Carlisle, PA.

Time: 8:30am to 11:30 am

Place: Hotel Carlisle, 1700 Harrisburg Pike, Carlisle, PA 17015

Cost: None!

Who Should Attend: Anyone that uses IMS (You do not have to be in the Harrisburg Branch - All are welcome!)

Why attend:

- Ask questions
- Get training
- Tips on using IMS
- See the latest updates
- Tell us what you like and don't like
- Tell us what we need to change
- Get information on future updates
- Demo the Call Center
- Hear what your peers have to say
- And more

We encourage you to bring as many people from your office as you like. It will be a relaxed business casual atmosphere to listen, learn and provide input.

Stay tuned - we will soon be announcing additional locations and dates.

This meeting is being hosted by Glenn Kricher of the Erie Harrisburg Branch. Thanks to him and Harrisburg Branch for coordinating and promoting this meeting.

Please RSVP to Brent Sheppard - Brent@xanatek.com - if you are attending and how many will be with your group.

Boot Camp Dates 2010

You have completed basic training, now "We want you!" to attend Boot Camp. You are invited to spend two fulls days with the Xanatek Staff in our brand NEW training facility. This intensive training course is designed to help you better utilize all the features IMS has to offer. Multiple Instructors provide in-depth training on all modules of the IMS software. Boot Camp is a classroom setting where each attendee is provided a computer to work along with the instructors. Open discussion is encouraged because we want you to also draw ideas from your peers on how they use IMS.

Class cost is \$299 per person. Dates have changed, in observance of Good Friday April 2, to April 8th and 9th, 2010. Class will be held at our new office, address above. Special Xanatek rates at the Ramada Inn, just \$69 a night.

To learn more about hotels and travel information visit [Boot Camp](#).

To register click [here](#).

See you there!

Referral Program

You can make an extra \$100.00 to \$500.00 just by telling your friends and associates about us.

As many of you already know, Xanatek will pay you for each lead that purchases Insurance Management Solutions. We have recently improved the program to require all referral of prospects to be submitted on our website. This is to promote fairness and ensure you get your much deserved cash! Make special note of rule number 2 below to find out how to submit.

Here are the rules:

1. The lead has to be new to Xanatek. If Xanatek has already spoken to the lead, it does not qualify.
2. You have to submit the prospect on Xanatek.com. Please visit our website and submit the name, address, phone and email.
3. First come first serve. Sometimes we will have more than one person refer the same agent. We will pay the referral fee to the first agent who tells Xanatek about the lead.
4. Paid-in-full. The referral fee will be paid after their bill is paid.

Here are some additional tips:

- Have the lead remind us where they heard about us. In other words, have them tell us that you sent them.
- Feel free to ask us how it's going! If you refer someone, we would be glad to keep you informed about the sales process.
- Xanatek may change this program at anytime. We also reserve the right to distribute the amount.

Thanks and keep referring!

Brent Sheppard

Announcing Linktomyagent

It's almost here! Xanatek will soon be offering Linktomyagent.com. Simple and easy to use web forms that will allow customers or prospects to submit quotes, change requests, certificate requests, or general contact inquires. Once received by you, they can be directly imported into IMS.

Linktomyagent.com will work two ways. A prospect could go to linktomyagent.com and search for an agent by selecting their state, city, and a list of participating agents will be displayed. The second way is a direct link from your website. For example - You can link to linktomyagent.com/youragencypage. Once at your page, your logo and contact information will be displayed.

The customer or prospect can then request a quote for Auto, Home, Life or Commercial. They may also submit a endorsement, request a certificate, general contact inquiry. The submission data will be emailed to you and a copy to your client or prospect. Once received by the agency, you will have a way to add the information to an existing client or setup an entirely new prospect.

This is just the beginning, if response is good, we will be adding commercial line quote forms and more. The cost will be \$200 to setup your pages and \$25 a month will be added to your IMS monthly support.

If you're interested, please contact Brent@xanatek.com

Xanatek Now LinkedIn



Xanatek now has a group on the popular LinkedIn.com. We hope this will help to connect users and facilitate discussion on IMS. A few discussions have been started, but we need more.

To find the Xanatek group:

- Click in the search box.
- Type in Xanatek as the search criteria.
- Change the search type to "Search Groups" (Search People is default).
- Click the "Search" button.

Please feel free to join and share the group with everyone you know. If you have any question or comments please email Brent@xanatek.com

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Xanatek has a fan site on the popular Facebook.com. Join us today.

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