



## Weekly Newsletter

May 14, 2010

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Pay your monthly maintenance fee with Visa, Mastercard, American Express or Debit cards. If you are interested in automating your monthly payment contact us at [tstansbury@xanatek.com](mailto:tstansbury@xanatek.com)

### Tip of the Week!

#### Manually Entered Policy Information

There are two kinds of policies. The ones that download and ones that don't. Even the policies that do not download need representation in your management system in order to get the most bang for your buck.

Think about a customer that has Auto, Home, Life and an Umbrella policy. One of the many benefits of IMS is the ability to see all of a client's policies in one place, regardless of the carrier. Well that same benefit applies to policies that are not downloaded. In the example of the customer with the four policies above, the Life policy will, more than likely, not download. If there is any policy that does not download, you would want to add the policy to that client's policy tab.

If you have record of all the policies each customer has, downloaded or not, then you can use IMS Reports to find customers that do not yet have a certain type of policy. If the life policy in the example above was not added into IMS you would not be able to use IMS as an effective cross selling tool. If you have not yet entered all of your manual policies into IMS, it's never too late. Your carriers that do not provide downloads may even be able to send you a list of all the non-downloaded policies that you have with them. If the carrier is willing to provided you with such a list, you can use it to enter those policies into your system more efficiently.

Once your data is up to date, a whole new world of possibilities opens up to your agency. You will have all your clients' information at your fingertips. You will be able to search for them, not only by name, but by policy number as well. Your reports will be more accurate for both production and marketing. Letters can even be merged with information like policy type, carrier name and expiration date on them individually

and we'll send you the paperwork!

or as group.

### Webinar

### Helpful Hints

**Date:** May 28, 2010  
**Times:** 11 AM and 3 PM  
**RSVP:**  
[Dburkart@xanatek.com](mailto:Dburkart@xanatek.com)  
**Please Include:** Agency Name, Name and Email Address of attendees, time each would like to attend.

All are welcome to join us as we cover how to manage manually entered policies.

- Downloaded policy history is stored beginning with the first download you receive on a policy
- Manual policy history is created by scanning information into IMS as an Image
- Non-Downloaded policies should be added to the policy tab of the clients file in order to be used for reporting purposes
- Add the policy number to the policy tab before a download to save time assigning it later
- Carriers may be able to provide you with a list of non-downloaded policies so you can enter them into IMS, if you have not already done so
- To search by policy number visit our archived tip of the week on the [IMS Find Feature](#)
- Learn more about merging [Letters with policy information](#)
- Cross selling reports are built right into IMS as [Orphan Reports](#)

All archived tips can be viewed by visiting our website, [www.Xanatek.com](http://www.Xanatek.com) . Select Weekly Newsletters under the Tech Support Heading.

### Real Time Inquiries through IMS

Real Time inquiries are coming to IMS! Transformation Station is in the final stages of beta testing. If you are interested in signing up for Transformation Station and Real Time Inquiries, then now is the time. If you are interested in adding Real Time to your agency's capability e-mail [tech@xanatek.com](mailto:tech@xanatek.com) with your agency's name, how many workstations you would like it set up on, and what carriers you are using. There is NO COST for this new feature! All we need to know is that you want it. Once we have your agency's information, we will get in touch with you to schedule a time to set this up for your office.

(Please note: Erie does not work with Transformation Station.)

### Boot Camp 2010

You have completed basic training, now "We want you!" to attend Boot Camp. You are invited to spend two full 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.

## **NEW Boot Camp Dates 2010**

July 15 & 16

September 16 & 17

Day One - 9:00am to 5:00pm

Day Two - 9:00am to 4:00pm

Class cost: \$299 per person

Cost includes two days on instruction, lunch both days and class material.

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!

### **Xanatek User Group Meetings**

Xanatek will be hosting several user meetings this year.

**Who should attend:** Anyone that uses IMS! 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.

### **Why attend:**

- Ask Questions
- Get training
- Tips on using IMS
- See 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

**Date:** May 20, 2010

**Place:** Hilton Garden Inn Washington/Greenbelt, 7810 Walker Drive  
Greenbelt, Maryland

**Time:** 9:30am - 12:30pm

**Cost:** \$39 Per Agency

Please RSVP to Brent Sheppard - [Brent@xanatek.com](mailto:Brent@xanatek.com) - if you are attending and how many will be with your group.

Linktomyagent

It's here! Xanatek is now 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 inquiries. Once received by you, they can be directly imported into IMS.

Linktomyagent.com works in 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 an 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](mailto:Brent@xanatek.com)

### **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

**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](mailto:Brent@xanatek.com)

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