



Weekly Newsletter

October 9, 2009

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Tip of the Week!

Linkedin

Be a Fan of Xanatek

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Autopay

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 dburkart@xanatek.com and we'll send you the paperwork!

Events

Want to know where Xanatek will be this year?

Click [Events](#)

Come and see us or send a referral.

Boot Camp!

Tip of the Week!

In celebration of Customer Service Week here is a tip that will get you started thinking about ways you can use IMS to provide special services to your customers that will set you above the crowd in their minds.

Thank you cards

Use IMS reports to send out thank you cards to your new customers that you've written in the last month, quarter or year. You could even include the offer to provide the same great service that they received, to anyone they may wish to refer to your agency!

Driver's License Expiration Reminders

Did you know IMS has a place to store DLN Expiration dates? Did you know that you can run a report to figure out who's licenses are about to expire? You could give them a quick call or use IMS Letters to mail them all reminders a month in advance. Consider making this part of your start up questions, "We offer this service. Are you interested?"

Offer an Email Option

You're going paperless with IMS. Why not extend the option to "go green" to your customers? Who knows they may want to help you save the planet and would prefer to receive email communications from you.

To let IMS help you keep track of your green clients consider the following ideas.

- You can use the *Mail To* code in IMS to mean. Are the getting snail mail or E-mail. Mail To = Yes if they wish to continue to receive snail mail. Mail To = No if they'd like to join your email efforts. Then when you go to run a marketing report you can run two. One where Mail To = Yes to know who gets a letter and one where Mail To = No for an email list.
- Client does not have email? No problem. Make

There are still a few seats available for Boot Camp, November 12th and 13th, 2009!

Xanatek provides lunch both days and all your classroom material! Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations and more information visit [Boot Camp Info](#).

a comment. The *Comments* field, found on the *Comments and Hobbies* tab is the appropriate place to make if they do not have email and you'd like it to be note, so that you don't ask them again. You never want to enter anything other than an actual email address into the email address field. If you do then any email report you run to locate email addresses will be inaccurate.

IMPORTANT

If you adopt the *Mail To* feature be sure everyone in your office understands it and intends to use it in the same manner. Otherwise your reports will not be accurate.

It doesn't stop here! Think about the information you record in IMS. What would you like to use it for? If you would like help implementing any of these ideas or one of your own we're waiting to hear from you. Call Xanatek Tech Support (800)820-1665.

[Click Here](#) to check out our archived Tips of the Week online.

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 inquiries. 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.

Early Bird Special - Sign up before the October 31st launch and the setup fee will only be \$100!

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

Referral Program

To: All IMS and Image Archiver Users

Re: Referral Fee Program

Make \$100.00 to \$500.00 by telling your friends and associates about us.

As many of you already know, Xanatek will pay you for each lead that purchases Image Management System for insurance and for Image Archiver. We love referrals and I am sure you do too! Below you will find our rules on paying referrals. PLEASE read carefully as I often get calls long after the install asking for the referral payment. We must be able to verify you are the reason the agent purchased or contacted Xanatek.

The key things to remember:

The agent must be NEW to IMS - agents already in our system may not qualify. YOU must have provided Xanatek with the contact information prior to Xanatek contacting the agent.

A referral will not qualify if:

A Xanatek sales representative has already been in contact with them.

We have no way of verifying you were the referring agent.

Another agent has already referred them.

You call many weeks or months after the user has installed IMS and you ask for referral after the fact. (Exception: if we have previous documentation supporting your referral.)

We do our best to track all the leads you provide us. Please contact us with any questions. The best way you can refer someone is to email Brent@xanatek.com Here are the official 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 notify us of the lead. Please call, fax, or email us with the lead info. We must get name and phone number to contact them.
- 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 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 between multiple lead generators when necessary. Amount

of referral fee will be set at time of sale and is based upon purchase price paid by the lead.

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

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

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