



Weekly Newsletter

November 2, 2009

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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.

Tip of the Week!

Make More Money

Can you imagine what a treat it would be if you got to work one morning and there was a seemingly endless supply of clients at your door waiting to see you? What do you suppose the trick would be to making that dream a reality? Why it's an IMS report, of course. That list of clients waiting to hear from you are already in your management system! Read on to learn how you can tap into the revenue you already have waiting for you.

The least expensive way to bring in more business is to work with what you already have. You've already won your current clients over with your service and/or products, so the hard part is over. Now all you have to do is figure out what more you have to offer and offer it. Let IMS Reports help you uncover all you have to offer your existing clients with an orphan report.

How To:

1. Open *Reports* on the IMS 3 Menu.
2. Locate the *Policies* folder in the reports list to the right hand side of the reports window.
3. Click the plus sign to expand and show the reports in the *Clients* folder.
4. Locate the *Orphan Report* and double click to load the report
5. Select the criteria you would like to find.
Example: Has at least one: Auto, Home, Life, Health, etc. Doesn't have at least one: Auto, Home, Life, Health, etc.
6. Locate the *Index* drop down on the file menu above the buttons to the left of the reports window.
7. Select *Return Distinct*. This prevents the same file name from being listed twice on your report.

8. Click the *Report* button in the top left hand side of the reports window to see your

More Bright Ideas:

- Click the little green plus sign to the end of the criteria line to add additional criteria to narrow your report.
- Once you locate your untapped revenue consider creating a letter to inform your clients what you have waiting for them to discover or how you can help them save.
- Don't forget to ask them if there is anyone else that they know that could benefit from your assistance.

Click [Here](#) to view all of Xanatek's 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 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.

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

Be a Fan of Xanatek



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

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