



Weekly Newsletter

November 23, 2009

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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

Dear Brent,

It's that time of year again. The time of year when we all start counting our blessings. We just wanted to let you know that we appreciate your business and the opportunity to serve you all year round.

Sincerely,

Your Xanatek Support and Sales Team

Tip of the Week!

Make More Money (Part Two)

Last time we helped you find all the potential for making money that was already waiting for you at your agency with an IMS *Orphan Report*. Now are you wondering how many other clients are really out there? If they aren't yours already, then they are either someone else's or no one's. Let IMS help you keep track of them so you can make them yours with IMS *Prospects*. Read on to find a wealth of ideas to help you get started.

[Click here for part one of Make More Money](#)

Prospects

Let's brainstorm. How do you meet new prospects? Do you get a call from them? Do they stop in to see you? Do you call them? Do you meet them in person at events? No matter where or how you meet your prospects taking a few minutes to enter them into IMS *Prospects* goes a long way.

If you're already taking the time to collect information, why not add the ability to look up and report on that information? Plus, all the information you add will move to their client file with them when they decide to purchase their coverage from you.

If you have ever entered a client into IMS, you already

a referral.

have all you need to know to get started. Simply click on *Prospects* from the IMS 3 Menu and select the *Add* button. You can start a new Prospect file with as little information as a name and contact information. From there you gain the advantage of creating a *Todo* for your new prospect file so you never forget to follow up with them. IMS will remind you daily what you have "Todo" so the pressure is off. Just enter your todo notes and choose the next date you wish to follow up with them, until your task is completed and send it all into a note in their file.

Reporting

It doesn't stop there, the sky's the limit! Collect and enter more information and you are granted almost limitless reporting. Birthdays, zip codes, occupations and anniversary dates are all reportable and could help you narrow your prospect reporting to your heart's desire.

If you have ever ran an IMS Report? Then you already know how to run a report on your prospects. Open *IMS Reports* and locate the *Index* option above the buttons and click *Prospects*. This changes the list of people you are searching for your *Clients* to your *Prospects*. From here you can report on the information you are entering on your prospects and even merge letters to them as a group, print labels or export their information to spreadsheets!

Status Codes

One of our favorite reports is the *Status Code* report, because you can build and customize your status codes for clients and/or prospect reporting options to meet your individual agency needs. Do you already use status codes for your clients? Did you know you can use them for your prospects too? To create new status codes you need access to *Maintenance* which can be found under *Tools* on the *IMS 3 Menu*. Once in *Maintenance*, select *Codes* on the left hand side, select *Status Code* from the list of codes and click the *Add* button at the top of the window. Any status codes added become available for all clients and prospects. Make as many as you like.

To add a *Status Code* to a client or prospect record, locate the file you wish to add the status code to. Make sure you are on the *Primary* tab. Click the *Edit* button and move to the *Comments and Hobbies* tab. There you will find six opportunities to add a status code. The code will be visible on the *Primary* tab to draw your attention to any important detail the code may represent and it will also be available to report by

when you need to locate all the records that have the code in common.

Click [Here](#) to view all of Xanatek's archived Tips of the Week online.

Xanatek is Moving!

On January 15, 2010 the office will be closed for relocation to the Chase Tower in downtown South Bend, Indiana.

Xanatek is relocating to facilitate our continued growth. The entire office space has been renovated to our specifications in order to provide better service, technical support, and workflow. Highlights of the space include:

- More than double square footage.
Larger training area doubling our current onsite training capacity.
- Increased phone capacity.
- Fiber connectivity to the Internet for more stable and faster support.
- Discounts with the hotel located in the building for those attending Boot Camp.
- Great views of South Bend, Notre Dame, and the area.

We will be offering limited support on the 15th due to the disruption of phone service. Phone numbers will remain the same. Mailing address should be changed to 211 W Washington Street, Suite 1900, South Bend, IN 46601 after 1/15/2010.

Please visit our new location anytime after the 15th.

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 Image 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 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.

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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