



Weekly Newsletter

December 31, 2009

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Be a Fan of Xanatek

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Tech Support
800.820.1665

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](#)

Calling All Safeco and Auto Owners Agencies

We are looking for any client who has either Safeco or Auto Owners (or both) who are willing to help us test out our new Transformation Station technology. Transformation station will allow you to make "Real Time" inquiries with various carriers. Before we can roll it out, we need the assistance of several clients to get certified with the carriers. If you are interested, please notify us at tech@xanatek.com. Thank you in advance for your help in making this project a reality!

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.
Come and see us or send
a referral.

Tip of the Week!

Call Note Documentation

Still searching for a new years resolution. How about perfecting the art of documentation? With IMS it is easier than ever to keep track of every conversation you have with a client or prospect. Here are a few simple rules to get you started. Worried about remembering it all? It's as easy as learning your ABC's. There's one rule for every vowel, A, E, I, O, & U!

Always make a note in IMS

For every conversation you have with a client or prospect add a note. Include the reason for the call, answers given/ decisions made and actions taken.

Benefit: You'll always have record of the conversation to refer back to when questions come in later.

Enter name of person(s) you spoke with

Example: Spoken with: Jennifer Smith

Benefit: You can always prove who you spoke with when decisions are made or questions asked.

How To with Call Center: Look for the new insert name and options at the end of the description line and to the right of the call note. Also try the other insert options for "spoken with:" and several others! Simply hold your mouse over the different buttons to see their functions. Click to add.

Note: The Above Call Center feature is available on our newest version available 3.6.5. If you do not see the option, you need to be updated. Contact your office manager to check for our recent update email titled "Important Update from Xanatek" or call (800)820-1665.

How to with IMS only: Simply get into the habit of starting an IMS note every time you speak to a costumer and add the name of the person you spoke to right at the beginning of your note.

Insert date

Consider that the date in question may not be the day that you are hearing the information.

Example: If you were being notified of a loss that occurred over the weekend, consider entering DOL: 12-26-2009 into the description.

Benefit: This will aid you in your search for claims notes on that file in the future.

If you are entering a note the day of, no additional action is needed, because IMS is

already date stamping the note with today's date.

O Order notes by topic

Even if that means making two notes during the same conversation.

Example: If you received a call that a new car was purchased and through the course of that conversation you realized that the client moved. You have two topics.

How to: You can click the *Add* button from the notes tab up to 5 times in order to streamline notes organization.

Benefits: By following this suggestion you will increase visibility of notes and decrease search time. When you go looking for the note about the move, it won't be hidden in the note described as being about a new vehicle purchase.

Use categories

This is an excellent habit to get in to, always categorize you note(s).

Benefits: No matter where you have the opportunity to add a category in IMS, it opens a whole new world of sorting, searching and reporting options.

How To: Topic = category

Example: In the example above, two notes would be made, one categorized by topic pertaining to purchase of new vehicle, category = "personal auto", and the other pertaining to the move, category = "homeowners".

Don't see a category you need? Categories can be added, changed and replaced by a supervisor with Maintenance rights in IMS.

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

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 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

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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