



## Xanatek Weekly Newsletter

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### Contact Information

Xanatek, Inc.  
PO Box 160  
Granger, IN 46530

[www.Xanatek.com](http://www.Xanatek.com)  
[tech@xanatek.com](mailto:tech@xanatek.com)

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](mailto:dburkart@xanatek.com) and we'll send you the paperwork!

### Boot Camp

There are still a few seats available to our next Boot Camp scheduled for April 30th and May 1st! Cost

### Tip of the Week!

#### Campaigns

Do you ever wish that everyone in your office followed the same procedure to ensure that the customer was guaranteed consistent service? If you have, then IMS Campaigns may be just the ticket! Campaigns are enhanced Todos that can be structured to meet your agency's service standards.

Example:

If for every **new prospect** you would like

- A follow up phone call made to the new prospect within 5 days
- A follow up letter mailed in 14 days
- "Thank you letter" mailed in 30 days
- "Referral Letter" or "What could we have done better?" sent after 90 days

This can be done by setting up a "New Prospect" Campaign to create these 4 tasks in uniformity to ensure quality service all around.

How to Create a New Campaign:

1. Go to the misc. tab of any client/prospect
2. Select "Prospecting Tools" from the drop down list next to the thumb tack
3. Click in the bottom half of the tab in the Campaign area to indicate that you wish to work with a Campaign
4. Click Add at the top of the screen. If the Create Campaign window should appear. If the Edit Prospect Data window appears, click in the bottom half of the tab in the Campaign area to ensure that you have indicated that you wish to work with a Campaign.
5. Click the "Add" button towards the top left of the Create Campaigns window

will be \$249 per person.

Xanatek provides lunch both days and all your classroom material!

Register now at [Boot Camp](#).

For hotel recommendations visit [Boot Camp Info](#).

6. The Edit Campaign Template will appear
7. Type a name for the Campaign that you wish to create in the Description area
8. Click " Add Task" to the bottom left of the Edit Campaign Template window
9. Describe task, assign a user, indicate the number of days after campaign creation you would like this task to appear on the user's schedule and then click save.
10. Repeat adding tasks as needed.
11. Once the Campaign is completed it will appear in the "Select Campaign" drop down with in the Create Campaign window for future use with any Client/Prospect to provide consistent service to your customers.

Note: The start date of the campaign can be changed for any campaign from the create campaign window. E.g. If you wish to assign the New Prospect Campaign to a customer on a Friday, you may not want Saturday and Sunday included as two of the days before you are prompted to complete first task. You can choose to move the start date ahead to Monday in this case.

### Erie Premiums

Erie is now sending personal line downloads with premiums and fees added together. This is being done in preparation for commission downloads, but it has presented some new challenges. What this means for you is that your total Erie Premium will appear higher than expected. We are interested in receiving your feedback on this change. Please respond with your opinion to [Steve@xanatek.com](mailto:Steve@xanatek.com) so he may pass your thoughts on to Erie for consideration.

### Are Your Backups Running Successfully?

It is a great idea to check the success of your back-ups frequently. If you (or your tech) can check this about once a week, it could save you the frustration of realizing, all too late, that they were not successful. No matter what form(s) of back-up you use, we recommend that you be involved in knowing your back-up process.

Note: If you are using the IMS CD Burning Software as a form of back ups, it's simple. Just check the burn log after each cd burn and make sure that the success was marked true.

If you are using other forms of back up, and are unsure how to check the success, you should consult the person(s) that set it up for directions on checking the success of your back-up.



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