



## Xanatek Weekly Newsletter

May 16, 2008

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### **Contact Information**

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### **Autopay**

### Tip of the Week!

#### WOWing Your Customer

Your customer's expect that your agency is going to service their insurance needs, but so will the agency down the street. Finding the WOW factor with your customer's is what is really going to set you apart from other agencies.

IMS 3 can help you do just that! Tap into the information that you collect on the demographics tab and it can become so much more than just data entry. Here are a few ideas of how you can put that data to use WOWing your clients!

- Use the Anniversary date to collect Wedding Anniversaries and run a report once a month to see who's anniversaries are coming up and send a reminder letter addressed to the husband. No offence men.
- Run a report once a month for Driver's Licenses that are up for expiration and send a reminder letter to go get it renewed. I know I can't be the only one that would have appreciated to get that reminder.
- You've all heard the suggestion to run a birthday report and send a happy birthday letter to your insureds. Have you ever thought about

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mailing the birthday cards to anyone in the contacts tab under 12 years old? Who do you think is going to be more excited to receive a birthday card? Not only that you're marketing to the next generation.

- Maybe you don't think everyone would want such services and you may be right. So consider offering them as a service when you write new business. "Would you like me to email you a reminder a week or two before your wedding anniversary Mr. Brown?" You'll be a hero!

## BootCamp Schedule

The next Boot Camp will be **May 22 & 23**, 2008!

It's not too late. Seats are still available! To reserve your seat, visit [BootCamp](#).

If you have already signed up and have not received a reply, please email [Brent@xanatek.com](mailto:Brent@xanatek.com).

As a note, Xanatek may change the date due to lack of attendance or unforeseen circumstances beyond our control.

## Commercial Downloads Now Available From Erie!

Drum Roll Please! Erie is now releasing commercial downloads to all Xanatek Clients!!! Here are you few answers to some questions that you may have when visiting [www.agentexchange.com](http://www.agentexchange.com).

- Your IMS version is 3.
- You may go ahead and request all lines of and your book of business.
- Erie has stated that they will be processing these submissions on Sunday. Then the next upload/download that you do for Erie will create the files for your IMS AL3 Download program.
- The process for Commercaill downloads is no different than the personal lines that you are already recieving, so the process of assigning through your IMS AL3 Download program will be exactly the same.

## Online Backup Now Offered from Xanatek!

Xanatek Online Backup provided by Carbonite is now available for Microsoft Windows 2003, XP and Vista servers!

Setup Fee \$139

Yearly Renewal \$45

Unlimited IMS Storage

Here is what you get:

- Xanatek will install and setup your backup (must be on a Microsoft Windows 2003, XP, or Vista server or workstation)
- Xanatek will verify that your backup is synchronized 30 days after installation
- Data will be encrypted for safe keeping.
- Xanatek will be able to restore files for you

Call the support line at (800) 820-1665 with questions or to get started!

## Meeting Speaker

If you have a coffee house meeting or some other type of monthly or quarterly meeting and have speakers. Xanatek would love the opportunity to present our company to your meeting! If you are interested in having a Xanatek representative attend your meetings, please contact [Brent@xanatek.com](mailto:Brent@xanatek.com).

## Are you getting enough out of IMS3?

I often find that many of our agencies are not using IMS3 to it's fullest potential. I encourage you all to examine how you are using IMS3 quarterly. Many new functions have been added. Maybe you never learned about some of the old functions. Either way, chances are we can help your business in many ways you never dreamed. Let us help you!

There are several ways we can help your office better utilize IMS3

1. **Call us** - We are always a call away! If you don't ask, we cannot help.
2. **Boot Camp** - Attend a boot camp - get 2 days of detailed training. In addition, there will be many peers from different areas of the country that you can exchange ideas with.
3. **Xanatek On-site Consultation** - Don't want to attend boot camp, but still want to get up to speed. A trained Xanatek professional will go to your office and perform the following functions:
  - Review your network and make suggestions on hardware and software.
  - Spend 2 to 3 hours analyzing your work flow and office to evaluate how we might improve your utilization of IMS3.
  - Meet with owners/managers to discuss findings.
  - 3 hour group training with staff to implement changes.

All of this for \$1000 includes travel and all expense.

If you are interested, contact [Brent@Xanatek.com](mailto:Brent@Xanatek.com)

### Updated Referral 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 IMS3 and for Image Archiver.

Please send us email, fax, or phone call before the prospect makes a purchase. We often get many people saying they refer the same client. We want to be fair to everyone; you must contact us before the client makes a purchase. We will no longer pay the referral fee after the client has purchased and you have not contacted us. Often clients contact you after we have provided a user list. If we have provided the prospect a user list they no longer qualify as your referral unless you have contacted us before the list was given.

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 notify us of the lead. Please call, fax, or email us with the lead information before they purchase. We must get name and phone number to

contact them. An email or phone call saying your referred XXX agency will not qualify. You must provide name, address and contact information.

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.

Email Marketing by

 **SafeUnsubscribe**®

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