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May 17, 2007

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This email is being provided to you as a user of Image Management System for Insurance (IMS I!)

## Tip of the Week – Advanced Search

Have you ever needed to search for any images scanned in on a certain date with a certain description? Searches involving multiple things like this can be done using the Advance Search. In the Client or Prospect Information window, select the Images tab if you'd like to search for images, or Notes if you're looking for a specific note. Next, click the "Find" button at the top. In the search window, right-click the grid in the "Advanced Search" area and select "Add". In the new window, select whether you want to search on a date, description, category, etc., enter the search phrase under Step 3, and hit "OK". Repeat this process as much as you would like. When finished, click the "Search" button at the bottom. This will show all results at the bottom.

## The Hartford – We need YOUR Help!!!

We need your help! The Hartford will not setup new clients for download until Xanatek has enough customers calling and logging download requests. Please call Maggie Kelly at 860-757-1505 in the Agency Download department. Tell her you want your downloads to begin immediately with Xanatek and your management system IMS I!

### **Your Website (Continued)**

Last week I challenged you to look at your website. Does it look professional? Does it give the impression you want to portray?

I also suggested that you consider a micro-site. A micro-site is a very specific tailored website for a target market. You create pages that specifically address the needs of homeowners, garages, machine shops, restaurants, or whatever your specialty is.

Here are some GREAT examples of micro-sites. Check them out and see what your competition is doing!

<http://pizzapa.com/>

<http://www.mckayinsagency.com/Content/>

<http://charterschoolinsurance.com/>

<http://www.hospitalitymax.com/maxWeb/index.html>

The web is not the only sales tool, but it is becoming an important one! Make the best of it!

### **Real Time**

Real Time is the ability to access information directly from your management system with your carriers via the web to obtain "live" information.

There is a lot of talk about real time transactions in the industry right now. In fact, there is a concerted effort to double the amount of transactions processed via a real time interface.

Sounds great, right? According to all the information that you will be receiving from [getrealttime.org](http://getrealttime.org) and others, it's great! Well, it would be if the world was perfect, we all were good looking, and had no weight issues.

The statistics show very low usage for many reasons such as, slowness, expired passwords, lack of training and carrier support, unrealistic expectations, different levels of carrier implementation and more. *For many of you, it offers little or no benefit because your primary carrier does not support it.*

Right now it is a buzz word! Remember SEMCI? It was supposed to provide Single Entry Multi Company Interface. SEMCI is no longer a popular term in our industry as it did not enjoy carrier participation as expected. Let's hope that real time doesn't fall by the wayside as SEMCI. In theory, real time is a great solution and we believe that as more carriers adopt and develop, it will be.

*Somewhere in the middle is the truth. . .*

In the next few weeks Xanatek will be outlining the good, the bad, and the ugly of real-time. The staff at Xanatek recently had a full demonstration of Transformation Station from Ivans. We are diligently researching how it will impact you! Brent is talking with many industry leaders and attending several conferences in search of the truth.

Bottom line – Xanatek will be implementing real time in the future. We have not outlined an exact timeline as of yet.

### **Boot Camp! – Sign up NOW!!!!**

There is still time! If you are looking to get the most out of IMS I, then Boot Camp is for you! Remember the 2.5 hour training you got during the initial install of IMS I? Boot Camp takes the same training and extends it to 2 full days. You will get detailed instruction from the Xanatek staff and the chance to learn from other agents as to how they use IMS I. Seating is limited to a maximum of 12. Each attendee will have access to a computer to follow along with the instructor.

If you are serious about getting the most out of IMS I, then [sign up](#) now!

The next Boot Camp is May 24 & 25, 2007. Mark your calendars and register for the camp at [www.xanatek.com](http://www.xanatek.com) Please register as soon as possible, seating is limited and is going fast!

Seats are starting to fill up! Register now!

### **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 Image Management System for insurance and for

Image Archiver.

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 info. We must get game 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.

### **Call Center is now available for your agency.**

Until now, only large corporations with large budgets have been able to track and analyze all there incoming calls automatically! Xanatek is please to offer the Call Center! The Call Center is a powerful call tracking and reporting system that utilizes your incoming phone lines, caller ID and links with Image Management System for Insurance (IMS I). If you have looked for this technology in the past and found it to expensive, then look now, it's affordable! Just like IMS I, it will make your office more productive and efficient!

The Call Center has been designed to help you document and analyze your incoming and outgoing phone calls. All business owners know the importance of documenting conversations and logging all calls from customers. The Call Center will automate the process and much more!

Here are a few features that the Call Center offers:

- Logs all incoming calls
- Forces users to document conversations

- Tracks the number of calls each person handles
- Tracks all dropped calls
- Tracks all unanswered calls
- Tracks all transferred calls to voicemail
- Reports on average call length
- Reports on customers that call you the most
- Reports on daily call load (total number of calls)
- And much more!

The Call Center utilizes your current phone lines and caller id. All the equipment and warranty you need will be provided by Xanatek. No changes to your current phone system are needed.

Call the office for pricing or if you have any questions!

**We would like to email this newsletter to everyone in your office. Please send a list of all email address's in your office to [tech@xanatek.com](mailto:tech@xanatek.com).**

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