



## Xanatek Weekly Newsletter

July 18, 2008

### **In This Issue!**

Autopay

Tip of the Week!

Fall Boot Camp

Monthly Drawing

Referral Program

Best of IMS

Updated Carbonite

Erie Commercial

Meeting Speaker

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### **Autopay**

### **Tip of the Week!**

#### Todos- Notes & Copy Tab

- Try right clicking in the notes section of the todo on the second tab labeled "Notes & Copy". You will find stamps that you can use to automate that you left a message, sent an email, or no answer.
- Copy Todos to other users in your office by checking off the check box by that users name on the notes & copy tab.
- Try a right click in the area of the other user's names to select copy to all users!

### **Fall Boot Camp**

Want to get more out of IMS? IMS Boot Camp will inform, educate, and stimulate your office! We limit each class to a maximum of 12 people.

In most cases at least 8 agency's will be represented from various states. The classroom environment provides the opportunity to learn from our instructors and your classmates. Each attendee is supplied with a computer so they may work along with the instructor.

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!

Ample time is given for questions and open discussions.

Xanatek provides lunch both days and all your classroom material!

We have fun too! Thursday night you are encouraged to have dinner with the group to further your discussions. After dinner, voluntary attendance to relax and enjoy downtown South Bend at one or more of our establishments!

Our next Boot Camp is now scheduled for September 18th and 19th, 2008!

Cost will be \$249 per person. Register now at [Boot Camp](#). For hotel recommendations visit [Boot Camp Info](#).

## **Monthly Drawing**

### **Warm Referral Contest**

We are raising the stakes to a \$100 Visa Gift Card!!! For the month of July we want warm referrals. What is a warm referral you ask? A warm referral is someone that you contact and tell about Xanatek and our IMS product before referring them to us. For every warm referral you send our way in the month of July, your name will be entered into the drawing for the \$100 Visa Gift Card! That's right you can enter as many times as you want. All we need the referred agencies contact information, the person you contacted there and the last date you spoke to them about us! It doesn't stop there your agency will also receive a referral bonus for any referrals that become Xanatek customers! See additional article below for more details on agency referral bonuses.

Please send your referrals to [jmburkart@xanatek.com](mailto:jmburkart@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.

### **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)

### **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!

### **Commercial Downloads from Erie!**

If you have not yet downloaded your commercial book of business you can at anytime. All new requests are processed on Sundays at Erie. Meaning you will see your commercial downloads through the IMS AL3 Import Utility the week following your request.

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 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 Commercial downloads is no different than the personal lines that you are already receiving, so the process of assigning through your IMS AL3 Download program will be exactly the same.

### **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).

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