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July 25, 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 – Memo Editor (also called Office Memo)

IMS I has the ability to display an office memo when each user first starts the program. The user must say that they have read the memo before the program will allow them access to the main menu. This memo only is displayed on the start of IMS I. It will not popup if the user is already in the system.

The office memo is useful for when the entire office has to know something. Examples of this are a change to an office procedure or updated information concerning procedure with a carrier.

Have you educated yourself lately?

As I am writing this I am sitting at a conference in Vail, CO. It is an insurance technology conference. No sales – just learning. It

occurred to me that many of you do really well at staying up on the latest insurance changes. However, many spend so much attention to rates and coverages, but forget about the other areas of your business. When the last time you went to a technology conference or Boot Camp? What about marketing, management, customer service, or motivation? This is a little reminder that we need to pay attention to ALL areas of our business. It's more than just insurance!

AAA Insurance

We need your help with AAA. They need agents to call and ask for downloads. Once again we ask that you call and bug them. Contact Paula Falkenberg at (317)897-3545 or e-mail psfalkenberg@aaachicago.com

The Hartford – We need YOUR Help – Updated

We need your help! 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 !!

Boot Camp! – Registration Open for October 25 & 26

The next available Boot Camp is October 25 & 26, 2007. Sign up now at <http://www.xanatek.com/bootcamp-info.php>

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 name 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.

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