



## Weekly Newsletter

December 18, 2009

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### 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!

### Events

Want to know where Xanatek will be this year?

Click [Events](#)

### Tip of the Week!

#### **Year End Reporting & Record Keeping**

With the new year just around the corner there are sure to be all kinds of reports you would like to have your agency's little helper run for you. IMS is good at all sorts of reports. If you've been keeping track of who should be on your list all year. A friendly Xanatek team member can help you create a report to round them all up when the year comes to a close. Have an idea of something you've always wanted report on, but haven't been keeping track of the data because you simply didn't know where to start. We can help with that too. Just pick up the phone and dial (800)820-1665 or email [tech@xanatek.com](mailto:tech@xanatek.com) and we can help you get your new year started off with a bang. Tell us what you want to track and we'll help you pick the right plan of action to meet your agencies needs.

#### **What's on your wish list?**

1. Would you like to know how many clients you've gained or lost in the last 12 months? IMS gives you the opportunity to keep track of the dates of who has come and gone as well as the reasons why someone may have chosen to leave.
2. Need to send out Calendars, Christmas Cards, Thank You Cards or some other item that will help your agency stand apart in the eyes of your clients? Share your ideas for who should receive your mailers and how you've been keeping track of the information when you call and we'll share with you the most efficient way to print those labels.
3. Want to know how many customers heard about you from one form of advertising over another? IMS lets you build status codes to keep track of just that so you can decide where your money is best spent!
4. Do you wish you could eliminate duplications from the reports that you are already using to

Come and see us or send a referral.

save time, money and resources? There are all kinds of ways IMS can give you the opportunity to personalize your reports to include or disinclude certain groups from a report. Just let us know what the trouble has been. We can help you evaluate your data in order for you to try and eliminate the problem in the new year!

5. How about something that has always been in the back of your mind to call us about, but just haven't had the time. There's no time like the present to start off fresh in 2011. Just call us and share your thoughts and we'll offer some suggestion how IMS may be able to help your heart's desire become a reality.

Click [Here](#) to view all of Xanatek's archived Tips of the Week online.

### **Calling All Safeco and Auto Owners Agencies**

We are looking for any client who has either Safeco or Auto Owners (or both) who are willing to help us test out our new Transformation Station technology. Transformation station will allow you to make "Real Time" inquiries with various carriers. Before we can roll it out, we need the assistance of several clients to get certified with the carriers. If you are interested, please notify us at [tech@xanatek.com](mailto:tech@xanatek.com). Thank you in advance for your help in making this project a reality!

### **Xanatek is Moving!**

On January 15, 2010 the office will be closed for relocation to the Chase Tower in downtown South Bend, Indiana.

Xanatek is relocating to facilitate our continued growth. The entire office space has been renovated to our specifications in order to provide better service, technical support, and workflow. Highlights of the space include:

- More than double square footage.  
Larger training area doubling our current onsite training capacity.
- Increased phone capacity.
- Fiber connectivity to the Internet for more stable and faster support.
- Discounts with the hotel located in the building for those attending Boot Camp.
- Great views of South Bend, Notre Dame, and the area.

We will be offering limited support on the 15th due to the disruption of phone service. Phone numbers will remain the same. Mailing address should be changed to 211 W Washington Street, Suite 1900, South Bend, IN 46601 after 1/15/2010.

Please visit our new location anytime after the 15th.

## Referral Program

You can make an extra \$100.00 to \$500.00 just 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 Solutions. We have recently improved the program to require all referral of prospects to be submitted on our website. This is to promote fairness and ensure you get your much deserved cash! Make special note of rule number 2 below to find out how to submit.

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 submit the prospect on Xanatek.com. Please visit our website and submit the name, address, phone and email.
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 referral 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.

Thanks and keep referring!

Brent Sheppard

## Announcing Linktomyagent

It's almost here! Xanatek will soon be offering Linktomyagent.com. Simple and easy to use web forms that will allow customers or prospects to submit quotes, change requests, certificate requests, or general contact inquiries. Once received by you, they can be directly imported into IMS.

Linktomyagent.com will work two ways. A prospect could go to linktomyagent.com and search for an agent by selecting their state, city, and a list of participating agents will be displayed. The second way is a direct link from your website. For example - You can link to linktomyagent.com/youragencypage. Once at your page, your logo and contact information will be displayed.

The customer or prospect can then request a quote for Auto, Home, Life or Commercial. They may also submit an endorsement, request a certificate, general contact inquiry.

The submission data will be emailed to you and a copy to your client or prospect. Once received by the agency, you will have a way to add the information to an existing client or setup an entirely new prospect.

This is just the beginning, if response is good, we will be adding commercial line quote forms and more. The cost will be \$200 to setup your pages and \$25 a month will be added to your IMS monthly support.

If you're interested, please contact [Brent@xanatek.com](mailto:Brent@xanatek.com)

#### Xanatek Now LinkedIn



Xanatek now has a group on the popular LinkedIn.com. We hope this will help to connect users and facilitate discussion on IMS. A few discussions have been started, but we need more.

To find the Xanatek group:

- Click in the search box.
- Type in Xanatek as the search criteria.
- Change the search type to "Search Groups" (Search People is default).
- Click the "Search" button.

Please feel free to join and share the group with everyone you know. If you have any question or comments please email [Brent@xanatek.com](mailto:Brent@xanatek.com)

#### Be a Fan of Xanatek



Xanatek has a fan site on the popular Facebook.com. Join us today.

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