Marketing

Procedure/Function	Where Accomplished	How Accomplished
Running Callback Reports	Reports Module	Access Reports, Set Query for proper date range and generate the Callback Report for the proper Module (IM, BM, AMG, etc.)
Performing Callbacks with Daily Planner	Daily Planner	Enter your callbacks in the Daily Planner “To Dos” tab and attach the “To Do” to the appropriate Client, Prospect or Agent’s record.
Performing Callbacks through the Summary View	Summary View	Access Summary View and run a query for the appropriate module. Access the records one at a time and perform your callbacks. You may want to create a user-defined date field labeled “Call Back Date” to run your queries off of and to use for the setting of future callbacks.
Processing new Prospects Using the Job Manager	Job Manager and Task Manager	Build a Job, or number of Jobs, in the Job manager based on the type of Prospect (i.e. what line of insurance they are looking for). Once that type of prospect comes to you, link the appropriate job to the prospect’s record and the processing of the prospect will be automated.
Tracking your Advertising and Marketing Mediums	“Leadsource” Field of any Applicable Module with Lead Source Report	Enter your various Lead Sources (i.e. Magazines, Newspaper Ads, Yellow Pages, Mass Mailing Campaigns, etc.) as items on the Leadsource field list. When a prospect calls, enter the leadsource in their record. Reports can then be generated to give you feedback on which advertising and marketing mediums are giving the best return.
Performing Mass Mailings	Word Manager	Access the Word Manager and create a new document (either a merge or non-merge document) or load a previously created document. Once the desired document is displayed, single click on FILE then PRINT MAIL MERGE. Create your query (search) and the document will be printed for each record found through your query of the database.
Setting up a Marketing Campaign	Job Manager	Access Job Manager and create a new job which lists the tasks you wish to perform for each prospect in your marketing campaign. Once the job has been created, access the TARGETS tab and select the prospects you wish to market to through your campaign by way of a query. Once the prospects are displayed, select the desired prospects and your campaign will be underway.
Note Tracking	Any Module	Access the record to which you wish to enter or attach a note. Once the desired record is displayed, single click the NOTE icon on your tool bar and then the ADD button. Key in the desired note text and save your note.
Setting Future Contacts and Actions in your Daily Scheduler	Daily Planner	Access the record to which the action or appointment you wish to add pertains. Once displayed, single click on the Daily Planner icon and access either the Appointments or the To Dos tab (depending upon if the future action or item is a Date and Time sensitive item (i.e. an Appointment) or only Date sensitive (i.e. a To Do)). Enter the item or action on the appropriate tab and save the item. If you wish, you may attach the item to the desired record and even add notes and alarms to remind you or the item.

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Using Fact Finding Documents	Word Manager	Create a new merge document in the word manager. Use the User Defined merge fields to act as fact finding fields. To do this, single click on INSERT then FIELD. At the field selection screen, single click ADD and enter the name of the field (an abbreviated name which will be displayed on the document to show where the data will eventually be printed). Next, enter the prompt you wish to have displayed upon printing this document for this particular field (i.e. “Enter Prospect’s Full Name”). Repeat this step until all fact finding fields are entered. When you print this document, you will be prompted to enter various data which you can gather from the prospect. The document will then be printed to hardcopy and can then be used for data entry into your AGENCY EXPERT for Windows system.