

Applied Systems Client Network

SEMINAR HANDOUT

THE MARKETING MODULE OF TAM

ASCnet

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The Marketing Module of TAM

Objective: What is the objective of this class? What do you want people to learn?

Assumptions: This seminar is based on the following
TAM Version 7.3.0

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Adopting a Marketing Philosophy – the Potential of TAM

Before you start using the marketing features of TAM, you have to determine if your data is useful. And to make sure your data is useful, you have to adopt a marketing attitude in your office. This must be a top-down attitude, with buy-in from every level. Can't waiver or have some people not buy-in. Results become inconsistent, and worse, that lack of consistency causes E&O problems! Worse yet, that lack of buy-in yields no sales!

A garbage in/garbage out attitude can't be tolerated – you have to create a culture that expects good data in. Change the attitude and you'll change the results from your staff.

The marketing features of TAM can be used for more than just marketing to prospects, it can be an integral part of every workflow in your agency. Once you have adopted a marketing focus the next step is training. Going forward with marketing requires that each employee in the agency understand the marketing concepts and how integrated it is with every piece of information entered in TAM.

Adopting a Marketing Philosophy can be summed up in four steps:

1. Buy-in from the top down – every user must understand and believe
2. Determine what you want to do or track and write down a procedure
3. Train users to do it and implement the marketing features of TAM
4. Examine results: run reports to see how successful your marketing efforts have been.

The Marketing Capabilities of TAM

What areas are most important to the marketing module? In order to develop effective marketing, you need to focus on the data integrity of four areas of TAM:

1. Client/Prospect Detail Screens
2. Policy Detail Screens
3. Applications
4. Contact Management (formerly Info Screens)

Client/Prospect Detail Screens

The screenshot shows a software window titled "Prospect: Dr. Nancy Anderson". The window contains a form with the following fields and values:

- Name:** Dr. Nancy Anderson
- Address:** 345 Curtis Drive, Florence, SC 29502
- Phone:** 703-798-8123 (DVR), 703-798-3590 (Pvt), 703-798-2634 (Fax)
- Business:** The Agency Manager, Inc. (Agency 1), The Agency Manager, Inc. (Agency 2), Jean Stone (COR), Small Classification Firm (Code P1)
- Marketing Plan:** C13 - Does Not Add Coverage
- Call History:** 1 call recorded
- First Entered:** 04/13/2004
- Last Contact:** 11/20/2004
- Skip:** No (selected)

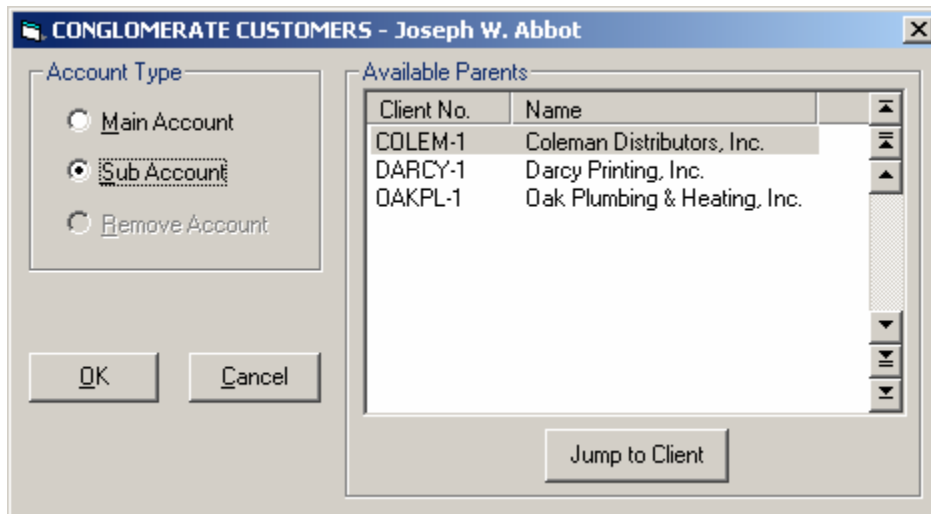
The information entered when a prospect is first entered is probably the most crucial data in the marketing process. Not only does this data help you to locate your prospects (this holds true for clients as well), but if entered accurately, provides you the means by which you can perform marketing programs.

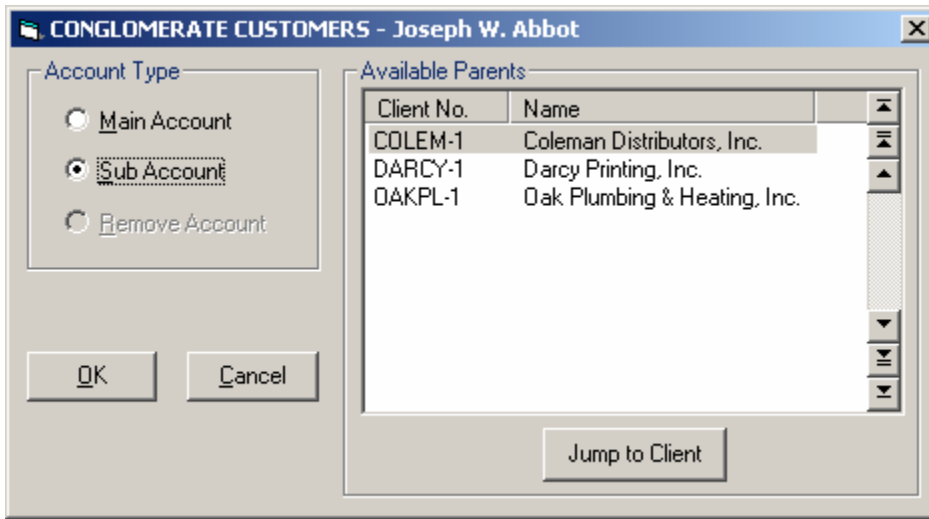
When completing the detail screen, you are required to select a **Marketing Plan**, and have the option to enter **User Fields**. The **First Entered** field is automatically filled in with the date the prospect is entered. The **Calls** field tracks how many times you have called this prospect if you are using the Log Call feature under Call History from the Options menu. One other very important field is the **Skip** question. Answering yes to this question means this prospect will be skipped from marketing plans. Answering no to this question includes this prospect in marketing searches.

It is important to train your users to understand the importance of completing this screen completely. All fields are searchable! Marketing plan and user fields are just two of the common searchable fields.

If you have completed the screen completely on the prospect side, when a sale is made and moved to clients, this data stays with the client and can continue to provide you with searchable fields for your marketing efforts.

A useful feature at the client detail level is **Conglomerate Customers**. Be sure to connect your main accounts with their related sub-accounts. This feature is accessed from **Options** on the client list. Be sure you have your main account selected, click on Options, choose **Conglomerate Customers**, indicate this client is the **Main Account** and click OK. Then select a related sub-account, click on Options, choose Conglomerate Customer again, and this time indicate this client is the **sub-account** and choose the correct main account (also known as parent) from the list on the right. Now when you view the client list, if you have the Conglomerate Customer column chosen for your list view, you will see which accounts have been conglomerated, and if so, which accounts are parent accounts and which are sub-accounts.





Policy Detail Screens

On the prospect side, the policy detail screen only provides a few fields for data entry – but it is important to know that each of these fields are searchable and also carry over to the billing screen when this prospect becomes a client.

Type	HOME	Homeowners	Exp Date	03/01/2005
Co	AS	Allstate	Premium	\$880.00
Pr	RFN	Robert F. Nobile		
Status	NEW	New Policy		
Brok				

Depending on how your agency wants to use the data available on this screen, you can use the **Co** field for the prospect's existing company, or perhaps you want to use it to indicate the company you are going to quote. The key is in consistency – choose one way or another. The data becomes difficult to interpret if everyone uses the fields differently.

If you enter as much information as possible in this screen, it enhances your marketing searches later. For instance, as this screen is completed above, we can run reports on how much business Robert F. Nobile is working on that expires in March, and also total the estimated premium of that business. Not to mention, we can include this prospect in searches for all home policies that we are quoting. The possibilities are as endless as your agency's creativity!

Keep in mind that the date shown in the **Expiration Date** field will advance a year when moved to clients – assuming the date shown is the expiration date of the current policy and you are writing coverage to pick up the next policy term.

Applications

If you want to market to clients that have a certain limit of insurance or perhaps clients who are missing certain coverages, completion of applications becomes very important. Consistency in data entry, and also in how downloaded information is brought in will be essential in being able to conduct accurate searches of your policy database. As each application is different, we won't go into how to enter data on your applications, but providing training that every field on an app is searchable will help your users understand the importance of data entry.

Contact Management

This developing area of TAM will soon replace **Info** screens entirely as Contact Management screens incorporate all the data that was held in Info screens. As additional information and functionality is added to Contact Management, these fields will also become searchable.

Much of the information in Info screens will be found in the **Driver Info** tab of your **Contact Detail** screen. You can see how much information you can record on a person (or persons) for a client. Multiple ways of contacting this person can be recorded, as well as their preferred method of contact. You will be able to search for birthdates as you can in Info screens now. You can search according to the Info Classes that were found on Commercial Info screens. Eventually the information that is still held in the Commercial Info screens will be part of Contact Management and those fields will continue to be searchable.

How to Setup and Implement Marketing Plans

This involves four features of TAM:

1. Marketing Plan Setup
2. Formletters
3. Activities
4. Marketing Wizards

Marketing Plan Setup

The first step of adding a marketing plan, is to determine what you want to accomplish first, the design the plan, then set it up in TAM. Coming into TAM without a written plan of what you want to setup creates confusion! Changing a marketing plan after it is in place can be difficult.

Once you have determined what you want to do on paper, you can setup your marketing plan. Under **Utilities, General, Activity Defaults**, you will find **Define Marketing Plans**.

To enter a new marketing plan, simply enter a unique three digit code and then a description of your marketing plan. When you click on accept, the first question asked is “**Will this campaign involve automated direct mailing?**” This question is asked because there are two types of marketing plans in TAM – **automated or non-automated**. Automated marketing plans consist of a series of letters which are generated automatically at specified intervals. These plans can be designed to operate without human intervention or you can follow-up manually after each letter.

Non-automated marketing plans are used to identify the source of a prospect or customer. The most common use of a non-automated marketing plan is to indicate on the prospect detail screen the source of the prospect. This information can later be used for statistical reporting.

When you enter a marketing plan on the prospect screen, TAM will use that code as the default marketing plan code on each activity filed for that prospect. Thus if a QUOT activity is recorded for a customer with TEL as their marketing plan on the prospect detail screen, you can later run an activity report for all prospects that have been quoted from your TEL (telemarketing) program.

For our example, we will choose an automated marketing plan – which means we have answered Yes to the question regarding whether this campaign will involve automatic direct mailing – and name it ASC. We get the following option screen next:

Marketing Plans

Is this campaign geared toward: Customers Prospects

How many different letters do you wish to send?

How many days apart should the letters be mailed?

Do you intend to manually follow up on each letter? Yes No

Default follow-up date
How many days after the letters are printed?

Select who should follow up on these letters CSR Producer Operator Other

OK

You can associate a marketing plan with either **Customers or Prospects**, not both.

You are then asked **how many different letters** (you can choose from 1-9) you wish to send and the number of **days apart** they should be mailed.

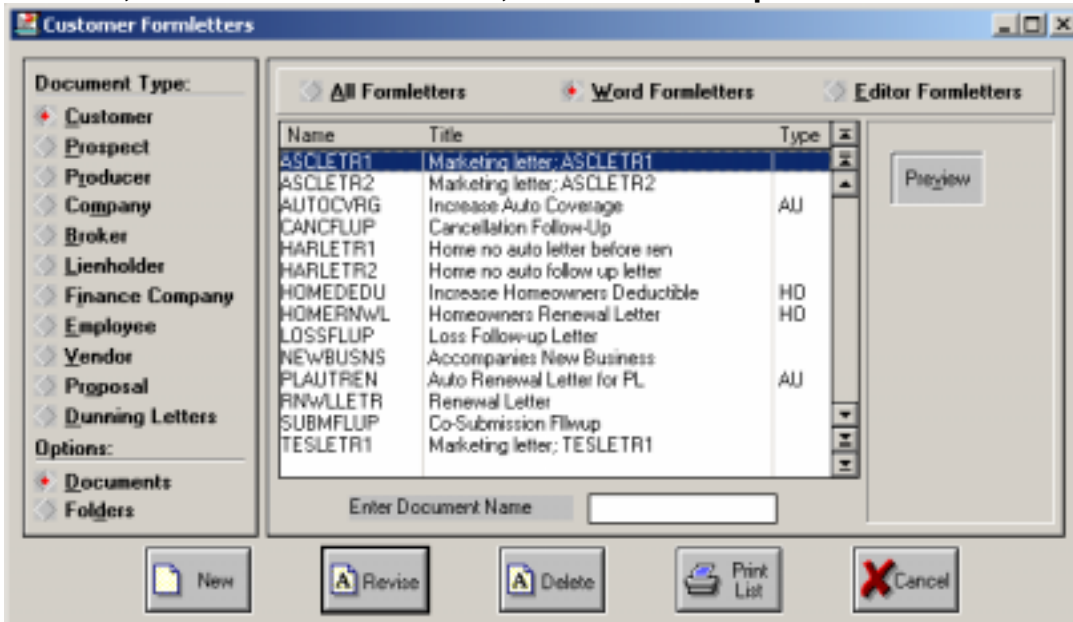
You are then asked if you plan to **manually follow-up on each letter**. If you intend to follow-up with a phone call seven days after the letter has been printed, you would answer yes to this question, and in the **Default follow-up date** field, you would enter 7. You will then be given the choice to select **who should follow-up on these letters**. This will create a follow-up for the individual specified. If that follow-up is not closed by the time the next letter would print, then the next letter will go out. If the activity is closed, then the marketing plan is discontinued and no further letters will go out.

Once you have selected your options shown above and click OK, you are prompted to select a letter batch as determined by what is setup on your system. When you have answered this question, your marketing plan is setup.

TAM has now created the number of letters and activities as you specified in your marketing plan setup. For instance if you said you wanted two letters, then two letters have been created (for our example, ASCLETR1 and ASCLETR2) as well as the two activities that these letters create (ASC1 and ASC2).

Formletters

To find the letters that were created by adding your marketing plan, go to **Utilities, General, Document Maintenance, Document Setup.**



In our example, ASC was the marketing campaign that was added and we chose to have it send 2 letters 30 days apart. Thus, the letters ASCLETR1 and ASCLETR2 were created.

Additionally, the letters were setup as shown in the picture to the left. We can now customize this letter even further by selecting an **Associated Form**, allowing us to

The screenshot shows the 'Formletter Setup' dialog box. It contains the following fields and options:

- Name:** ASCLETR1
- Description:** Marketing letter, ASCLETR1
- Associations:**
 - Associated Form:** <None>
 - Type of Form:** No
- Checkboxes:** Claim, Loss Notice, Contact, Commercial Info Screen
- Activity Defaults:**
 - Marketing Plan:** ASC (ASCnet Marketing Plan)
 - Activity Category:** ASC1 (Marketing letter, ASCLETR1)
- Print Batch:** LS (STATIONERY LETTERS)
- Attachment Category:** (Empty field)

Buttons at the bottom: OK, Edit, Cancel.

merge information from an application, and we also need to define an **Attachment Category** for this letter.

The **Activity Category**, ASC1, has already been defaulted because of our marketing plan setup selections.

Once your formletter is setup as you need it, then you will want to edit the letter as needed for your marketing plan.

Activities

Activity codes are also automatically generated once your marketing plan is created. To review the setup of the activity codes, access them through **Utilities, General, Activity Defaults, and Define Activity Categories**.

Activity File Defaults

Default follow-up date this many days from entry date:

Initiate further action this many days after the follow-up date:

Appear as category on the Exceptions Report

Generate customer formletter on action date

Generate prospect formletter on action date

Automatically close the item on action date

No further action; Leave item open

Select who should typically follow-up on this activity

CSR

Producer

Operator

Other

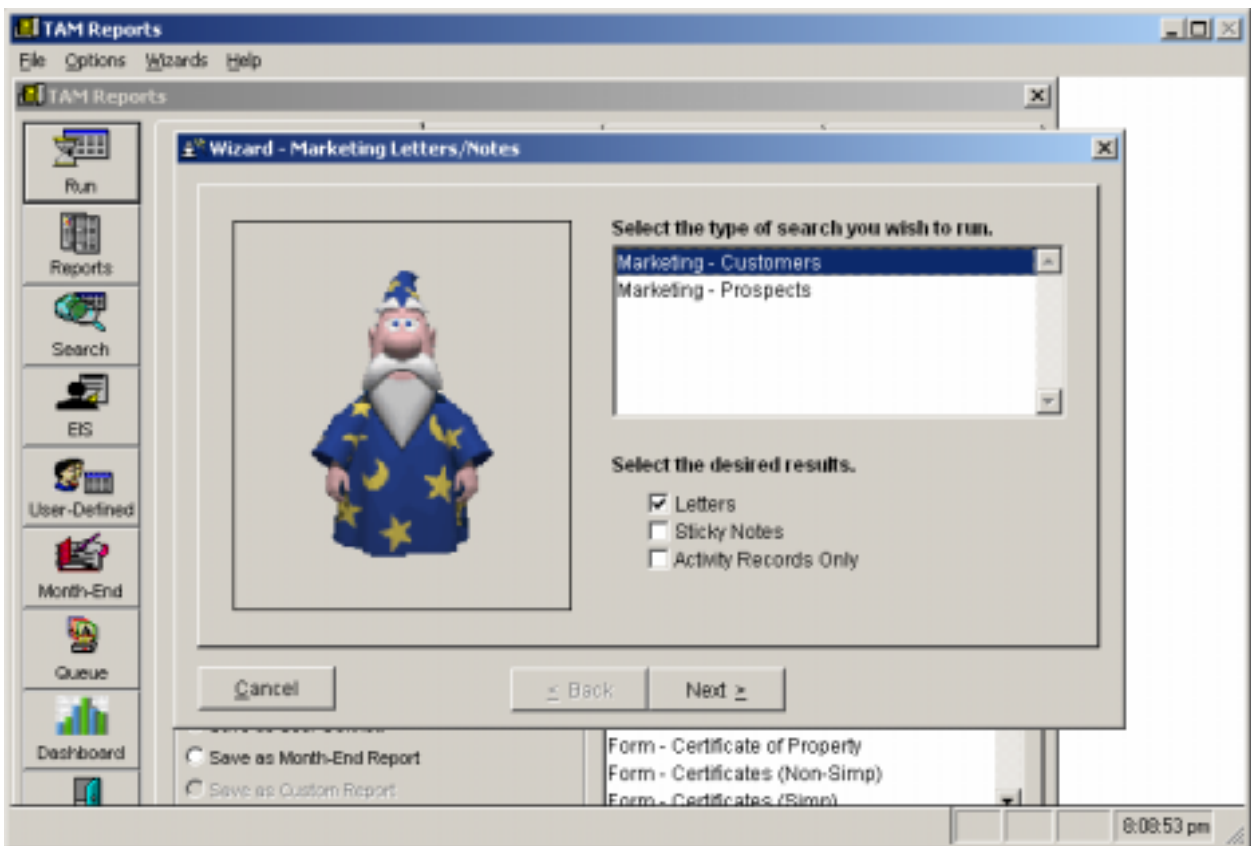
Once we have selected the activity, we can now update it with a more appropriate description and also edit the defaults as shown above. You can see the marketing plan at work though in that it defaulted to a 7 day **follow up** (because we indicated we wanted to manually follow up on each letter seven days after the letter) and it has a **take action date** of 30 days later (because we said we wanted the letters to be sent 30 days apart). The further action has already been selected to **generate a customer formletter on the action date**, and the Producer is selected as **who should follow up**.

It is important to note that you can manually create an automated marketing plan by creating activities and linking them to existing letters without creating a specific marketing plan.

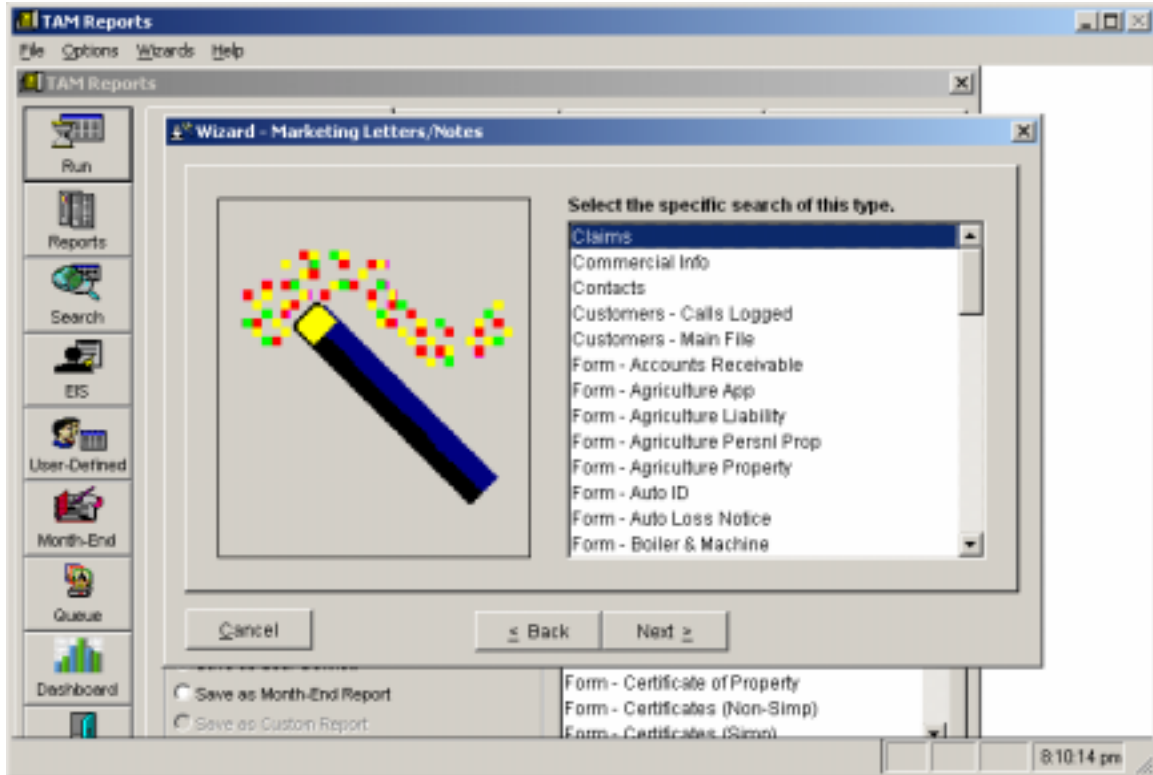
Marketing Wizard

There are two ways to start a marketing plan – and how you do so will depend on what you are trying to accomplish. If you are mass mailing letters to prospects who meet certain criteria, you will want to use the Marketing Wizard found in the Reports area of TAM. If you are selectively sending out marketing letters to certain clients, you will want to manually add the first formletter involved in the marketing plan so the remaining activities and letters are then processed automatically as the plan calls for.

To use the Marketing Wizard, access Reports from Home Base and then from the File Bar in Reports, select **Wizards**, and for our purposes, then select **Marketing Letters/Notes**.



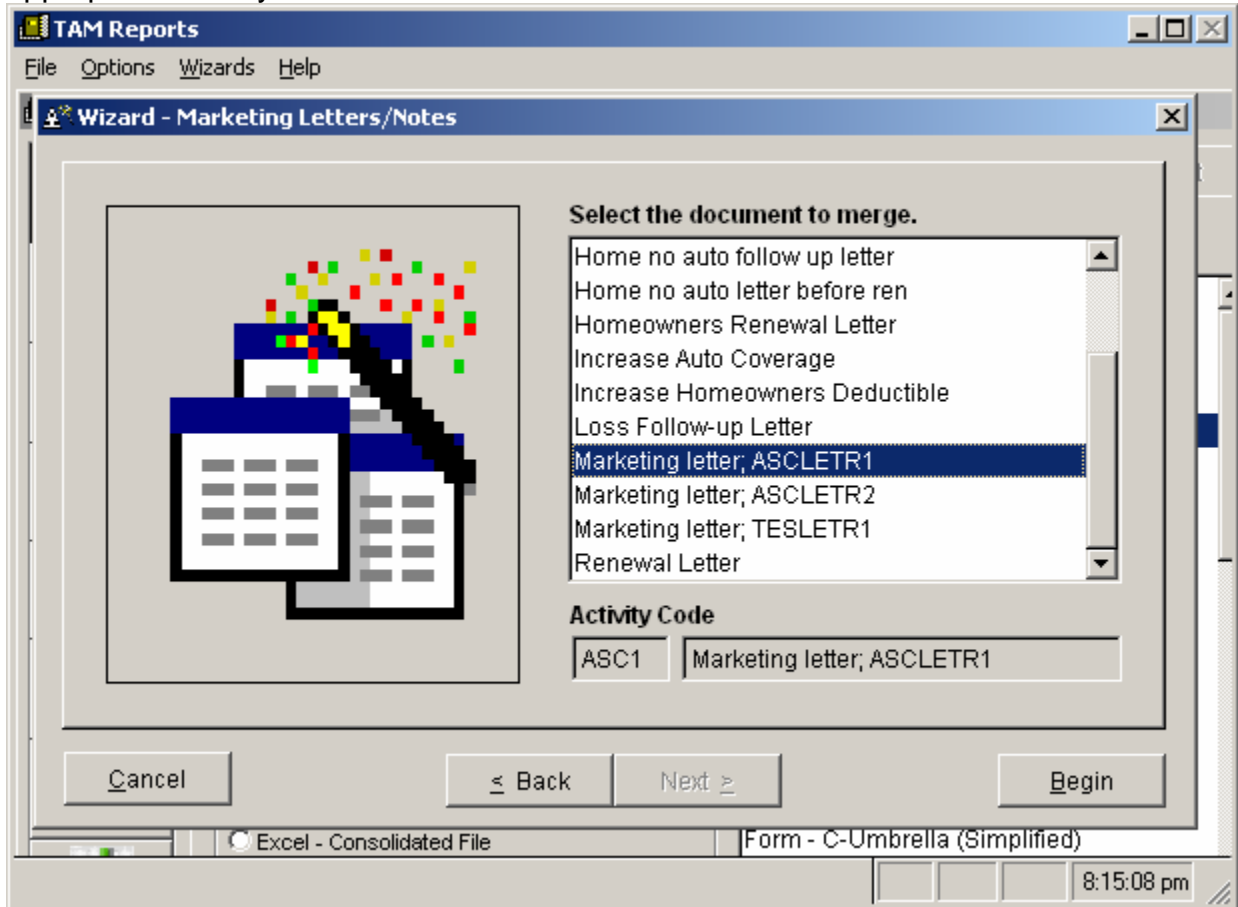
Now we have the wizard to guide us through each screen to generate our letters. First we are prompted to select whether this is for **Customers or Prospects** and what our **desired results** are: Letters, Sticky Notes, or Activity Records Only.



The next screen prompts us to select the specific search for this plan. You can see how many choices you have here – so if you want to search applications for specific data you can. You can also search from the Main File – which is the client detail screen, etc. We will search Customers – Main File for our purposes.

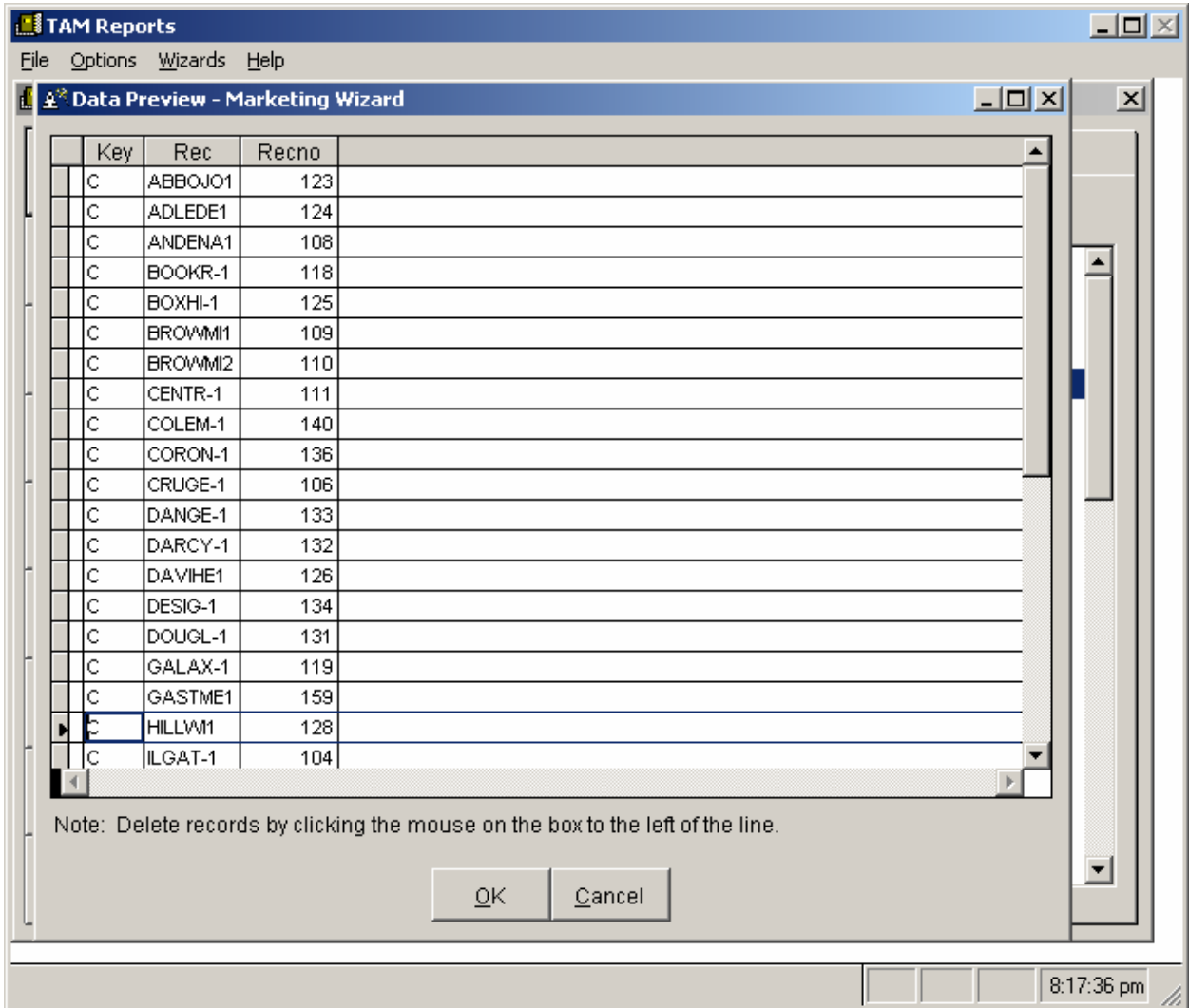
You are then presented with choosing the parameters for this search just as you would if you were running a regular search in TAM Reports.

Once your criteria have been selected, you are prompted with a list of your documents (since we said our desired results were to send a letter). Select the appropriate letter you want to send.



Once you have all your selections made, click Begin.

TAM will now process your search request and bring up a listing of all customers it found that met your parameters. You are presented with this list in the event you want to delete some customers listed.



Once you have completed refining this list, clicking OK will finish the process of generating the letters for these customers.

You are prompted with a question to **print the letters immediately** (if you choose No here, the letters will be queued and can be printed through Dequeue Documents found in Document Maintenance in Utilities). You are also asked if you want to **attach the Marketing Letters** to the client. Next, the applicable **activity** appears allowing you to complete as necessary (note that the same activity appears for each client that is receiving this letter as part of this marketing wizard, you cannot customize the activity with detail specific to one customer).

How to Track Marketing with TAM

Tracking Reports: Remember, the data that appears on these reports is directly related to the consistency and accuracy with which the activities have been completed!

Garbage in – Garbage out!

Activity Report – Lists all entries in the activity file by activity category. This allows you to analyze what has happened as a result of each entry. For example, you can use the report to list all entries that indicate sales to clients as part of a particular marketing plan. This report is designed to be run by the manager of the agency so that you can better assess the past and future activity of the agency.

Exceptions Report – Lists all of the activity file entries that were not followed up on by the take action date. This report indicates trends or patterns for a specific person or company which has not been processing work as expected.

Follow-up Report – Lists all entries in the activity file not yet closed. This report is designed as a daily “to-do” list. It can also be used to track the letters that must be followed up on, if a manual follow-up marketing plan was used.

Tracking Report – This report provides a listing of open entries in the activity file. Designed as a planning tool in assessing workflow and forecasting future workflow for agency personnel, this can be used to indicate where prospects came from and in what stage those prospects are in a marketing plan.

Rejection Reasons Report - Lists all entries which are closed as unsuccessful. This report allows management to find out which stage of a marketing plan is unsuccessful to make the necessary changes to enhance the effectiveness of the campaign in the future.

Marketing Plan Analysis – This report shows the various stages of marketing campaigns and the number of entries within each category. It can show the percentage of progress for each stage reached in the marketing campaign. It will also display the average premium associated with each activity category. The report allows management to track the effectiveness of each marketing plan.

Phone Call Analysis Report enables management to view the number of calls made to prospects and clients if the phone call log feature is being used. This report provides two formats, summary and detail. The summary report displays the total number of calls made, number of times the prospect/client was spoken to, number of times the person expressed interest and percentages for the two previous items. The detail report displays all the detail information for each of the above items, based on the use of the phone log.



2007 ASCnet Education Save the Dates!

Las Vegas Summit: March / April 2007

Niagara Falls ON, Canada Summit: May 10-11, 2007

Accounting Bootcamp: Orlando Summer 2007

ASCnet TENCon: Oct 16-20, 2007

Disney's Coronado Springs, Orlando FL

When was the last time you utilized the ASCnet Newsgroups?

The ASCnet newsgroups are users helping users via the Internet. The Newsgroups *are not a list serve*, but rather a bulletin board system allowing users to post questions in specific topic areas.

By utilizing the newsgroups on a daily basis, users can utilize experience and receive help from other users, without geographical limitations. The newsgroups are an outstanding resource to help you prepare for an upgrade, troubleshoot an issue, or just to help run your office better.

There is no additional cost - access to the newsgroups is included in your ASCnet membership!

@vantage	Remote Operations
Canadian Users	Reports
Hardware	Transformation Station
Helpline	UK Users
Imaging / Scanning	Vision Users
Internet Connectivity	* Not all newsgroups are listed above
Microsoft Office	

Visit www.ASCnet.org/newsgroups

Which ASCnet Tools Do You Need?

The Fast Track to Getting the Most From TAM

Integrating Word and Applied

A Guide to Document & Proposal Setup in TAM and Vision

The Guide To TAM Reports

Month-End Made Easy

Outlook Made Easy

Everyday Use & Integration with TAM & Vision

Did you know that you can customize them?

These Tools, like many of the products ASCnet offers, comes formatted in Microsoft Word and allows users to have the ability to edit to their agency specific policies and procedures.

Use the Conference Order Form!