



2014 Menu of Agency Support Services

17 TOP OF MIND TOUCH POINTS

Turning a monoline
customer into a
multi-line customer
increases retention
by 7x!

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Table of Contents

ORGANIC GROWTH

Policy Renewal Appointment Calls.....	4
Life Insurance Appointment Calls....	5
Long Term Care Appointment Calls.....	5
Vehicle Loan Cross-Sell	5
Home / No Auto Cross-sell.....	6
Auto / No Home Cross-sell.....	6

NEW BUSINESS

Business Insurance Prospecting.....	7
Commercial Auto Prospecting	8
Personal Auto Prospecting.....	8
Homeowner Prospecting.....	8

ADMIN SPECIAL

Payment Reminder Calls.....	9
Event Reminder Calls.....	9

GOOD VIBES

Welcome Calls to New Customers.....	10
Thank You Calls.....	10
Happy Birthday Calls.....	10

WIN-BACK BUNDLE

Auto Defector Win-back.....	11
Homeowner Defector Win-back.....	12

Chart of Services.....	14
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All services, terms, quantities and pricing in this publication are accurate at the time of publication, and are subject to change.

All outbound calls made by Engagex will display the local area code of the agent's office and the agency name or primary carrier.

Scripts for each type of call can be found at www.engagex.com/scripts



“The quality of your life is determined by the quality of your relationships.” - TONY ROBBINS

The same can be said about your business.

Profitable business relationships are built with frequent, quality touch points. Agents have been taught that frequent, quality touches with their customers (and prospective customers) are key to agency success, but agents often find it difficult to regularly reach out in a productive way.

We can help.

Our 2014 Menu of Services describes 17 different “Top-of-Mind Touch Points” that will help your agency acquire new customers, retain more business, and increase average premium via cross-sell and upsell opportunities. We’ll do the dirty work and send you the opportunities we uncover for you – while saving you time and money, compared to doing it yourself or assigning the work to office staff.

The nation’s largest insurance companies have trusted us with their Customer Touch Points for several years. We hope to earn your trust, too.



DESTINY SET

410

APPOINTMENTS

LAST MONTH

FOR AGENTS

Organic Growth

Huge growth can come from meeting with inbook customers to discuss changes and needs. Each service offering in this section is designed to help you organically grow (and retain) your inbook business.

POLICY RENEWAL APPOINTMENT CALLS

Contact your customers before their current Auto and/or Homeowner policies expire and invite them in for a policy double-check. For optimal results, have us begin calling about 30 days before the renewal date. Customers will also be invited to bring in any additional policies they have (whether you wrote them or not), so you can look for gaps and overlaps, similar to a Policy Review Meeting.

- Select 100, 150 or 200 names to be contacted for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

- **TO ASK A QUESTION OR BEGIN SERVICE, VISIT WWW.ENGAGEX.COM/MENU OR CALL 1-800-515-8734**

LIFE INSURANCE APPOINTMENT CALLS

Sometimes you just want to talk life insurance with customers. Our Callers will invite your existing customers to take advantage of your competitive rates, and set an in-office appointment with you or someone in your office who can have a deeper discussion with them about life insurance.

- Select 100, 150 or 200 names to be contacted each month for \$310, \$457.50 or \$600. We will make up to three contact attempts per name. List submission instructions will be provided upon signup. 90 day minimum subscription.

LONG TERM CARE APPOINTMENT CALLS

One of the fastest-growing areas of need today, LTC appointments provide you with an excellent opportunity to discuss benefits and options of Long Term Care insurance, face-to-face, in your office. Customers will also be invited to bring in any additional policies they have, so you can look for gaps and overlaps, similar to an IFR meeting.

- Select 100, 150 or 200 names to be contacted for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

VEHICLE LOAN CROSS-SELL CALLS

Help your customers save money on their auto loans. Our Callers will invite your inbook customers to take advantage of your competitive auto loan rates, and offer to warm-transfer them to you and/or someone in your office who can have a deeper discussion with them about auto financing.

- Select 100, 150 or 200 names to be contacted for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

Customers are more likely to stick with you when they receive calls offering to review/renew policies, saying “Thank You” or “Happy Birthday”.

When customers have at least 7 different policies with you, data shows they are yours for life!

- TO ASK A QUESTION OR BEGIN SERVICE, VISIT WWW.ENGAGEX.COM/MENU OR CALL 1-800-515-8734

Just the act of inviting a customer to meet with you for policy review/renewal increases retention – whether they come in or not!

Engagex regularly makes calls in English and Spanish. If you need an additional language, just ask! Many of our Callers have served religious/service missions overseas and we have a deep pool of language skills available.

HOME / NO AUTO CROSS-SELL CALLS

Our callers will make these high-propensity calls notifying existing customers that they may be eligible for additional discounts when adding an auto insurance policy through through your agency. We will offer to warm-transfer them to you and/or someone in your office who can have a deeper discussion with them about auto insurance.

- Select 100, 150 or 200 names to be contacted for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

AUTO / NO HOME CROSS-SELL CALLS

Our callers will make these high-propensity calls notifying existing customers that they may be eligible for additional discounts when adding a home insurance policy through through your agency. We will offer to warm-transfer them to you and/or someone in your office who can have a deeper discussion with them about home insurance.

- Select 100, 150 or 200 names to be contacted for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. Online

- **TO ASK A QUESTION OR BEGIN SERVICE, VISIT WWW.ENGAGEX.COM/MENU OR CALL 1-800-515-8734**



New Business

Imagine the growth you can achieve via a steady supply of new sales opportunities. Engagex will call on the leads that you receive and/or that you purchase from Lead Providers (Engagex does not provide or sell leads). You can send us multiple batches of leads throughout the month (large or small) for immediate contacting.

BUSINESS INSURANCE PROSPECTING

Increase your commercial book of business! Our Callers will set exclusive, face-to-face appointments with business owners and/or decision makers who need a quote for renewing general liability and worker's compensation insurance.

- You provide 100, 150 or 200 names to be contacted each month for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. 90-day minimum subscription.

- **TO ASK A QUESTION OR BEGIN SERVICE, VISIT WWW.ENGAGEX.COM/MENU OR CALL 1-800-515-8734**

ALBERTO SET

425

APPOINTMENTS

LAST MONTH

FOR AGENTS

Engagex is headquartered in beautiful Provo, Utah, at the base of the “Silicon Slopes”. Provo was recently ranked #1 for Community Optimism, #2 for Business/Careers and #4 in Health & Well-being.

COMMERCIAL AUTO PROSPECTING

Increase your commercial book of business! Our Callers will set exclusive, face-to-face appointments with business owners and/or decision makers who need a quote for renewing their fleet insurance.

- You provide 100, 150 or 200 names to be contacted each month for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. 90-day minimum subscription.

PERSONAL AUTO PROSPECTING

Want new auto insurance customers without making cold calls yourself? Our Callers will telephone prospect for you, inviting local auto owners to receive a free auto insurance quote from your office. We will warm-transfer interested contacts to you or someone in your office who can have a deeper discussion with them about auto insurance.

- You provide 100, 150 or 200 names to be contacted each month for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. 90-day minimum subscription.

HOMEOWNER PROSPECTING

Want new home insurance customers without making cold calls yourself? Our Callers will telephone prospect for you, inviting local home owners to receive a free home insurance quote from your office. We will warm-transfer interested contacts to you or someone in your office who can have a deeper discussion with them about home insurance.

- You provide 100, 150 or 200 names to be contacted each month for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. 90-day minimum subscription.

- **TO ASK A QUESTION OR BEGIN SERVICE, VISIT WWW.ENGAGEX.COM/MENU OR CALL 1-800-515-8734**



Administrator's Special

Reduce your ongoing administrative burden by assigning time-consuming or unpleasant calls to Engagex.

PAYMENT REMINDER CALLS

Ensuring timely collection of premiums due can be time consuming and unpleasant. Our Callers will place a brief, courteous call to customers to remind them they have a payment due soon.

- Select 100, 150 or 200 names to be contacted each month for \$110, \$157.50 or \$200. We will make one contact attempt per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. 90 day minimum subscription.

EVENT REMINDER CALLS

Are you hosting an Open House or other event for your customers? Our Callers will place a brief, courteous call to customers to invite them to your event.

- Select 100, 150 or 200 names to be contacted for \$110, \$157.50 or \$200. We will make one contact attempt per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

RACHEL SET

397

APPOINTMENTS

LAST MONTH

FOR AGENTS

Engagex's Callers are often drawn from the 65,000 students who attend the two universities in our valley: Utah Valley University and Brigham Young University. They are bright, articulate and ambitious.

Good Vibes

The occasional friendly and non-sales call can go a long way toward keeping and growing a customer's business. Sending out "good vibes" will come back to you in a positive way.

WELCOME CALLS TO NEW CUSTOMERS

A personal "Thank You" call to a new customer can go a long way toward keeping and growing a customer's business. Our Callers will place a brief, courteous thank you call to your customers.

- Select 50, 100 or 150 names to be contacted each month for \$55, \$105 or \$150. We will make one contact attempt per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. 90 day minimum subscription.

THANK YOU CALLS

Just saying "thanks" can go a long way to keeping and growing a customer. Our Callers will place a brief, courteous call on your behalf thanking your customers for their business and letting them know you are available to answer any questions that may come up in the future.

- Select 500, 1000 or 1500 inbook names to be contacted for \$550, \$1050 or \$1500. We will make one contact attempt per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

HAPPY BIRTHDAY CALLS

One of our favorite calls to make, customers generally respond very well when we place a brief call on your behalf to wish them a Happy Birthday and thank them for their business.

- Select 100, 150 or 200 names to be contacted each month for \$110, \$157.50 or \$200. We will make one contact attempt per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup. 90 day minimum subscription.

- **TO ASK A QUESTION OR BEGIN SERVICE, VISIT WWW.ENGAGEX.COM/MENU OR CALL 1-800-515-8734**



Win-Back Package

Don't let recent defectors get away! Engagex will contact your recently defected insurance customers and let you know when there is an opportunity to win someone back.

AUTO DEFECTOR WIN-BACK

Don't let recent auto insurance defectors get away! Our Callers will contact your recently defected auto insurance customers and ask for permission to prepare a new auto insurance quote, and then transfer interested contacts to you or someone in your office who can gather the necessary information to prepare a new quote.

- You provide 100, 150 or 200 names to be contacted for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

- **TO ASK A QUESTION OR BEGIN SERVICE, VISIT WWW.ENGAGEX.COM/MENU OR CALL 1-800-515-8734**

LA-SHANA SET

358

APPOINTMENTS

LAST MONTH

FOR AGENTS



ASHTYN SET
401
APPOINTMENTS
LAST MONTH
FOR AGENTS

HOMEOWNER DEFECTOR WIN-BACK

Don't let recent home insurance defectors get away! Our Callers will contact your recently defected home insurance customers and ask for permission to prepare a new home insurance quote, and then transfer interested contacts to you or someone in your office who can gather the necessary information to prepare a new quote.

- You provide 100, 150 or 200 names to be contacted for \$310, \$457.50 or \$600. We will make up to three contact attempts per name, and will leave a voice message if necessary. List submission instructions will be provided upon signup.

- **TO ASK A QUESTION OR BEGIN SERVICE,
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CHART OF SERVICES:

2014 Menu of Offerings

Organic Growth Bundle

INBOOK WORK	NAMES TO CALL	COST	NAMES TO CALL	COST	NAMES TO CALL	COST	TYPE
Policy Renewal Appointments	100	\$ 310	150	\$ 458	200	\$ 600	Subscription
Life Insurance Appointments	100	\$ 310	150	\$ 458	200	\$ 600	Subscription
Long Term Care Appointments	100	\$ 310	150	\$ 458	200	\$ 600	Project
Vehicle Loan Cross-sell	100	\$ 310	150	\$ 458	200	\$ 600	Project
Home/No Auto Cross-sell	100	\$ 310	150	\$ 458	200	\$ 600	Project
Auto / No Home Cross-sell	100	\$ 310	150	\$ 458	200	\$ 600	Project

New Business Bundle

OUT-OF-BOOK PROSPECTING WORK	NAMES TO CALL	COST	NAMES TO CALL	COST	NAMES TO CALL	COST	TYPE
Business Insurance Prospecting	100	\$ 310	150	\$ 458	200	\$ 600	Subscription
Commercial Auto Prospecting	100	\$ 310	150	\$ 458	200	\$ 600	Subscription
Personal Auto Prospecting	100	\$ 310	150	\$ 458	200	\$ 600	Subscription
Homeowner Prospecting	100	\$ 310	150	\$ 458	200	\$ 600	Subscription

Admin Special

INBOOK WORK	NAMES TO CALL	COST	NAMES TO CALL	COST	NAMES TO CALL	COST	TYPE
Payment Reminders ¹	100	\$ 110	150	\$ 158	200	\$ 200	Subscription
Event Reminders ¹	100	\$ 110	150	\$ 158	200	\$ 200	Project

Good Vibes Bundle

INBOOK WORK	NAMES TO CALL	COST	NAMES TO CALL	COST	NAMES TO CALL	COST	TYPE
Welcome to New Customer ¹	50	\$ 55	100	\$ 105	150	\$ 150	Subscription
Happy Birthday ¹	100	\$ 110	150	\$ 158	200	\$ 200	Subscription
Thank You to Customers ¹	500	\$ 550	1000	\$ 1,050	1500	\$ 1,500	Project

Win-Back Bundle

INBOOK WORK	NAMES TO CALL	COST	NAMES TO CALL	COST	NAMES TO CALL	COST	TYPE
Auto Defector Win-back	100	\$ 310	150	\$ 458	200	\$ 600	Project
Homeowner Defector Win-back	100	\$ 310	150	\$ 458	200	\$ 600	Project

* "NAMES TO CALL" represents the max. number of names to dial. Default is up to three dials per name.

¹ one dial per name



To learn more or to enroll in any
of our Agency Support Services,
call 1-800-515-8734.

www.engageX.com/menu