

What is RelEvent?

RelEvent is the most complete, web based insurance sales platform in the industry today.

Designed to build agency revenue, RelEvent is packed with everything needed to drive sales.

Whether you sell P&C, WC, BOP, Employee Benefits, Commercial Auto, Home or Auto are an independent or captive agent, broker, CSR or in-office appointment setter, RelEvent will increase your sales.

Hailed as the quintessential insurance sales system, carriers and agents across the nation have endorsed and agree that RelEvent is a "must have" on your desk top.



RelEvent

- Powerful Prospect Management
 - Record notes
 - Schedule follow up activity
- Customization that enables targeting
 - You select cities
 - You select business types
- Campaign Marketing
 - Generate mail campaigns
 - Custom marketing literature
- **Unlimited Prospects- INCLUDED!**
 - *Advanced flagging*
 - Web Based
 - No software to install
 - Access from anywhere
 - Daily Updates

...new features added...all the time...

This is the RelEvent **Profile View**, where you set up your preferences and focus your prospecting.

relevent Monday, June 30, 2008 Welcome Bill Kossack

Main View | Follow Up | Profile | Campaigns | Logout

Edit User:
 Username:
 First Name:
 Middle Initials:
 Last Name:
 Phone Number:
 Display Initials:
 Title:
 Display records per page

Interested in following Cities:
 Select a County:
 Move the required cities from Available list to Selected list

Available list		Selected list
Ancram	<input type="button" value="All >>"/> <input type="button" value="One >"/> <input type="button" value="< One"/> <input type="button" value="<< All"/>	Albertson
Ancramdale		Atlantic Beach
Austerlitz		Baldwin
Canaan		Bayville
Chatham		Bellmore
Claverack		Bethpage
Columbiaville		Carle Place
Copake		Cedarhurst
Copake Falls		East Meadow
Craryville		East Norwich

Display Options:
 Display records without x-dates
 Display Records with x-dates
 Display all records with expiration dates
 Display Records that expires between
 and days

Interested in following Class Codes:
 Accommodation - Rooming and Boarding Houses - 7213
 Accommodation - RV (Recreational Vehicle) Parks and Recreational Camps - 7212
 Accommodation - Traveler Accommodation - 7211
 Administration of Economic Programs - Administration of Economic Programs - 9261
 Administration of Environmental Quality Programs - Administration of Environmental Quality Programs - 9241
 Select all class codes

Powered By: cleardata

RelEvent is Completely Customizable

- Build your own geographic area
- Choose your own business types
- You decide how large or how small

Full Control and Unlimited Access

- Change your settings at will
- Time your marketing message
- Manage marketing activities
- Password protected

This is the RelEvent **Main View**, where all of your prospecting activity begins.

relevent Monday, June 30, 2008 Welcome Bill Kossack

Main View | Follow Up | Profile | Campaigns | Logout

Main View City: Class Code:

F	C	N	Owner	Name	City	Phone No.	# Emp	X Date
				Avenue D	Hempstead, NY 11550-4544	(516) 505-9277	1 to 4	07/05/2008
				Arps Tavern	Floral Park, NY 11001-2720	(516) 354-9870	1 to 4	07/04/2008
				Aqua Lounge	Glen Cove, NY 11542-1844	(516) 674-8676	1 to 4	07/01/2008
				Austins Bar & Grill	Island Park, NY 11558-1225	(516) 432-9068	1 to 4	06/26/2008
				Auntie M's	Seaford, NY 11783-2833	(516) 679-8820	1 to 4	
				B C Pub	Bellmore, NY 11710-3555	(516) 785-9753	1 to 4	
				Backstage Sports Bar & Grill	Woodmere, NY 11598-1734	(516) 374-5252	20 to 49	
				Backyard Outdoor Bar & Grill	Long Beach, NY 11561-1624	(516) 897-9708	1 to 4	
				Baker Hill Tavern	Great Neck, NY 11023-1217	(516) 570-6382	1 to 4	
				Barrel Inn	East Meadow, NY 11554-2435	(516) 794-1093	5 to 9	

Export current page only Displaying 1-10 of 214 (page 1 of 22) Go to Page

Select Records/Page:

Display records without expiration date.
 Display records with expiration date.
 Select all records with expiration date.
 Select expiration date between and days

Powered By: cleardata

View All Prospects

Based on your Profile settings, view the company name, address, number of employees, x-date in select states and other information. A click on any company will display additional company details.

Filter and Sort - Any Way You Want

- View all of your prospects at one time
- Filter by city, type of business or both
- Sort by employee size, city, x-date...

Targeting Your Market Has Never Been Easier...

This is the RelEvent **Detail View**, which contains additional information about the prospect.

The screenshot displays the RelEvent web application interface. At the top, the logo 'relevent' is on the left, and the date 'Monday, June 30, 2008' and user name 'Welcome Bill Kossack' are on the right. A navigation bar includes 'Main View', 'Follow Up', 'Profile', 'Campaigns', and 'Logout'. Below this, a status bar shows 'Owned by: None' with 'Own' and 'Set Follow Up' buttons. The main content area is titled 'Detail View' and features a 'Marketing Documents' dropdown menu with 'ClearData Mailer - If We Seem Serious' selected, and an 'Open Document' button. A 'Notes' section has an 'Add Note' button. The prospect details are organized into sections: 'BusinessName' (Aqua Lounge) and 'StreetAddress' (58 Landing Rd); 'CityStateZip' (Glen Cove, NY 11542-1844) and 'County' (Nassau); 'ExpirationDate' (07/01/2008) with an 'Edit Expiration Date' button and 'Last Modified by: bkossack on 06/30/2008'; 'ClassName' (Food Services and Drinking Places - Drinking Places (Alcoholic Beverage)); and 'Employees' (1 to 4). Three utility windows are overlaid: 'RelEvent Add Note' with a title and note field; 'Flag This Record' with a list of flags like 'Hot Prospect', 'Current Customer', etc.; and 'RelEvent Follow Up' showing a calendar for June 2008 and follow-up method options (Phone, Letter, Email, Visit).

Information Includes

-Business class name, phone number and contact name. In some states it also includes the current carrier and additional policy information.

Create Marketing Letters in 3 Clicks!

-Address and contact name are automatically imported
 -Use our marketing letters or upload your own
 -Supports color and logos

- Add & Keep Notes for Future Reference
- Advanced Flagging for Categorization

- Calendar Sets & Tracks Follow Ups
- Enter Your Own X-Dates

This is the ReEvent **Follow Up View**, which contains all the prospects that need a future marketing action.

relevent Tuesday, July 01, 2008 Welcome Bill Kossack

Main View Follow Up Profile Campaigns Logout

Follow Up View City: - All Profile Cities - Class Code: - All Profile Class Codes - Go

F	C	N	@	Name	City	PhoneNumber	X Date	FollowUp
				Avenue D	Hempstead, NY 11550-4544	(516) 505-9277	07/05/2008	07/09/2008
				1 Hour Photo	Bronx, NY 10462-1406	(718) 319-9015	07/24/2008	07/10/2008
				1 Life Entertainment-One Life	Bronx, NY 10468-6018	(718) 220-1720	07/30/2008	07/14/2008
				1 Brooklyn Locksmith	Bronx, NY 10462-1403	(347) 274-5801	07/30/2008	07/15/2008
				1 On 1 Divorce	Bronx, NY 10455-2716	(718) 292-4235	07/31/2008	07/22/2008
				1 Express Auto Repair	Bronx, NY 10456-6638	(718) 585-3176	07/28/2008	07/31/2008

Export current page only Export to Easy AdMaker Export

Select Records/Page: 10 Retrieve past follow-ups : Go back 0 days Go

Powered By: cleardata

Your Automatic To-Do List!

- Organized by the date set for the follow up
- Icons remind you which action you chose to take

Same Powerful Filters as Main View

- View all of your follow ups at one time
- Filter by city, type of business or both
- Sort by employee size, city, etc...

Organized for you to **CLOSE THE SALE!**

This the RelEvent **Campaign View**, where a few clicks is all you need to create a mass-marketing campaign.

relevent Tuesday, July 01, 2008 Welcome Bill Kossack

Main View Follow Up Profile Campaigns Logout

Campaign Name: Displaying Non X-Dated Data

Campaign Description:

Cities for Campaign:

- All Profile Cities -
- (Bronx) Bronx

Class Codes for Campaign:

- All Profile Class Codes -
- Accommodation - Rooming and Boarding Houses - 7213
- Accommodation - RV (Recreational Vehicle) Parks and Recreational Camps - 7212
- Accommodation - Traveler Accommodation - 7211
- Administration of Economic Programs - Administration of Economic Programs - 9261
- Administration of Environmental Quality Programs -

Include records without x-dates

Include Records with x-dates

All Records with x-dates

X Date Between

07/01/2008 & 10/29/2008

Include only Zip Codes that begin with

Calculate Records

Mark records as part of this campaign

Select Criteria For Flags

- Hot Prospect
- Current Customer
- Do Not Call
- Dream 100
- Dream 50
- X-Customer
- Previously Quoted

Campaign Printing Options:

Print sorted by Zip Code

Print sorted by Business Name

ClearData Mailer - If We Seem Serious

Print Save Campaign

Export to Excel (default fields) Export

Powered By: cleardata

4 CLICKS...It's Really That Quick!

4 clicks is all it takes to create and print your own custom marketing campaign complete with the company name, address and contact name automatically imported.

Make Your Selections

- Select the cities you want
- Select the business types you want
- Pick your marketing letter
- Click Print....*It Could Not Be Simpler!*

And Much More..

Conduct mailers weekly or monthly - Choose one of our marketing letters - Upload your own marketing letters - Print sorted by zip code - Save campaigns and repeat mailer – Target specific zip codes and business types



All RelEvent products and services are provided on a month-to-month basis.

- ✓ No Set-Up Fees
- ✓ No Contract
- ✓ No Lengthy Commitments



4115 William Penn Highway
Suite 201

Murrysville, PA 15668

Local (724) 387-1713

Toll Free (866) 586 - 2088

Fax (724) 387-1726

www.myrelevent.com/Nationwide.

sales@cleardataint.com

❑ RelEvent Base System \$47 per month

Create, conduct and manage all your sales and marketing activity in one powerful easy to use system. RelEvent is customized to fit your needs.

System includes: **Unlimited Prospects** - Unlimited Access - Prospect Management - Scheduled Follow Ups - Full Customization - Campaign Marketing - and more...

❑ RelEvent Base System plus X-Dates \$114 per month

92% of all US businesses have their commercial insurance package bundled. Dramatically increase your close ratio by timing your sales call for when your prospects come up for renewal.

Add X-Dates to your RelEvent subscription and focus your efforts on the businesses that have to make a buying decision. X-Dates take the guess work out of who to contact. Available in select states.

❑ Monthly Appointment Setting – 2 Options \$269 per month

Option 1

GUARANTEED APPOINTMENTS...if the appointment falls through, we replace it, FREE! We deliver 4 guaranteed appointments to you per month.

Option 2

GUARANTEED APPOINTMENTS...if the appointment falls through, we replace it, FREE! We deliver 2 guaranteed appointments to you per month and the appointments will have an employee count of 10 or more.

You select the geographic area and the classes of business and we make the calls. It couldn't be easier. Spend your time selling.

❑ Special Projects

Do you have a unique need or a special project that you would like to tackle? Give us a call. We have developed and conducted projects of all shapes and sizes.

Price depends on the scope of the project.