

What is RelEvent?

RelEvent is the most complete, web based commercial insurance sales platform in the industry today. Designed to build commercial DWP, RelEvent is packed with everything needed to drive sales.

Independent Agents and Brokers across the US use RelEvent to increase their commercial DWP. A study conducted by a major national carrier confirmed that regular users of RelEvent grew their commercial DWP by 15%-35%, with an average commercial policy amount of \$17,000.

Whether you are an agency principal, commercial specialist, a CSR or in-office appointment setter, RelEvent will increase your commercial sales. Agents and Brokers everywhere agree that RelEvent is a “*must have*” on your desk top.



The screenshot displays the RelEvent web application interface. At the top, there is a navigation bar with the RelEvent logo and the text "Wednesday, January 25, 2012 Welcome Top Agent". Below this, there are several tabs: "Main View", "Follow Up", "Profile", "Campaigns", and "Logout". The main content area shows a list of prospects with columns for "F", "C", "N", "Owner", "Name", "City", "Rating", "# Emp", "Risk", and "X Date". The list includes entries such as "Buck Jared T DDS", "Comstock Printers", "Green Mathew W", "H & S Construction", "Kenney MD Gregory J", "Pacific Post Tension", "Alpine Fastener & Hardware", "Alpine Fastener & Hardware Inc", "Charles E Cox", and "Deron Stockert".

Overlaid on the screenshot are several pop-up windows:

- A "Detail View" window showing a prospect's information, including "City: - All Profile Cities -" and "Class Code: - All Profile Class Codes -".
- A "Follow Up" window showing a calendar for January 2012 with a date selected for follow-up.
- A "Follow Up method" window with options for "Letter", "Email", and "Visit".
- A "Flag" window with a list of flags to select from, such as "Do Not Call", "Non Nationwide Customer", "Customer", "Nationwide 2012 Not Interested", etc.
- A "Note" window with the text: "Deron has 2 locations. He is a B... knows Scott Lee. Sending more info 2-1-1".

The interface also includes a sidebar with "Follow Up View" and "Detail View" buttons, and a top navigation bar with "Both", "Main View", "Follow Up", "Profile", "Campaigns", and "Logout".

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...

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

The screenshot displays the RelEvent Profile View interface. At the top, the RelEvent logo is on the left, and the date 'Wednesday, January 25, 2012' and 'Welcome Top Agent' are on the right. Below the header is a navigation bar with 'Main View', 'Follow Up', 'Profile', 'Campaigns', and 'Logout'. The main content area is divided into several sections:

- Edit User:** A form with fields for Username (bkossack), First Name (Top), Middle Initials, Last Name (Agent), Phone Number (412-793-3344), Display Initials (TA), and Title (Commercial Insurance Specialist). A 'Display' dropdown is set to 10 records per page.
- Interested in following Cities:** A section with a 'Select a County' dropdown (Please select a County) and a 'Move the required cities from Available list to Selected list' instruction. It features two lists: 'Available List' (empty) and 'Selected List' (Carson City, Gardnerville, Genoa, Glenbrook, Inlay, Lovelock, Minden, Stateline, Washoe Valley, Zephyr Cove). Navigation buttons include 'All >>', 'One >', '< One', and '<< All'.
- Display Options:** Two tabs, 'X-Dated Prospects' and 'All Prospects'. A section for 'Display records that expire between 0 and 120 days' with dropdown menus for the values.
- Interested in following Class Codes:** A list of class codes with checkboxes, including 'ABRASIVE OR BLASTING DISEASE - 0059', 'ABRASIVE PAPER OR CLOTH PREPARATION - 1860', 'ABRASIVE WHEEL MFG & DRIVERS - 1748', 'ADVERTISING CO. & DRIVERS - 9549', 'ADVERTISING: DISPLAY SERVICE - 9521', 'AGATE WARE MFG - 3224', 'AIR CONDITIONING DUCT FABRICATION AND INSTALLATION', and 'Select all class codes'.

At the bottom, there are three buttons: 'Update', 'Cancel', and 'Change Password'.

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

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

relevent

Wednesday, January 25, 2012 Welcome Top Agent

Main View | Follow Up | Profile | Campaigns | Logout

X-Dated Prospects | All Prospects

Your next follow-up is scheduled for Sunday, January 29, 2012

Main View City: - All Profile Cities - Class Code: - All Profile Class Codes - Go

F	C	N	Owner	Name	City	Rating	# Emp	Risk	X Date
		TA		Buck Jared T DDS	Carson City, NV 89703-3832	N/A	1 to 4	V	05/24/2012
				Comstock Printers	Carson City, NV 89701-1482	N/A	1 to 4	V	05/24/2012
		TA		Green Mathew W	Carson City NV 89701	N/A		A	05/24/2012
		TA		H & S Construction	Gardnerville, NV 89410-6034	N/A	1 to 4	V	05/24/2012
				Kenney MD Gregory J	Minden NV 89423	N/A		A	05/24/2012
		TA		Pacific Post Tension	Carson City NV 89706	N/A		A	05/24/2012
				Alpine Fastener & Hardware	Minden, NV 89423-8940	N/A	5 to 9	V	05/23/2012
		TA		Alpine Fastener & Hardware Inc	Minden NV 89423	N/A		V	05/23/2012
				Charles E Cox	Carson City NV 89701	N/A		V	05/23/2012
				Deron Stockert	Minden NV 89423	N/A	1 to 4	A	05/23/2012

Displaying 1-10 of 2103 (page 1 of 211)

Go to Page 1 >>

Select Records/Page: 10 Phone# only Filter: zipcode= Clear filter

Select expiration between: 0 and 120 days Go

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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.

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

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



Wednesday, January 25, 2012 Welcome Top Agent

Main View | Follow Up | Profile | Campaigns | Logout

Follow Up View City: Class Code:

Both

F	C	N	@	Name	City	PhoneNumber	X Date	FollowUp
<input type="checkbox"/>				Alpine Fastener & Hardware Inc	Minden NV 89423	(775) 267-4400	05/23/12	01/29/12 12:00 AM
<input type="checkbox"/>				Pacific Post Tension	Carson City NV 89706		05/24/12	01/30/12 12:00 AM
<input type="checkbox"/>				H & S Construction	Gardnerville, NV 89410-6034	(775) 782-0012	05/24/12	01/31/12 12:00 AM
<input type="checkbox"/>				Green Mathew W	Carson City NV 89701		05/24/12	02/02/12 12:00 AM
<input type="checkbox"/>				Buck Jared T DDS	Carson City, NV 89703-3832	(775) 883-3434	05/24/12	02/03/12 12:00 AM

Export current page only

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

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

Wednesday, January 25, 2012 Welcome Top Agent

Main View | Follow Up | Profile | Campaigns | Logout

Campaign Name: Displaying X-Dated Data

Retail

Campaign Description:

All Retail Stores in County

Cities for Campaign:

- All Profile Cities -
- (Carson City) Carson City
- (Carson City) Washoe Valley
- (Douglas) Carson City
- (Douglas) Gardnerville
- (Douglas) Genoa
- (Douglas) Glenbrook

Class Codes for Campaign:

- All Profile Class Codes -
- ABRASIVE OR BLASTING DISEASE - 0059
- ABRASIVE PAPER OR CLOTH PREPARATION - 1860
- ABRASIVE WHEEL MFG & DRIVERS - 1748
- ADVERTISING CO. & DRIVERS - 9549
- ADVERTISING: DISPLAY SERVICE - 9521
- AGATE WARE MFG - 3224

X Date between 01/25/2012 & 05/24/2012

Include only Zip Codes that begin with

Select Risk Type Both

Hot Prospect

Current Customer

Do Not Call

Dream 100

Dream 50

X-Customer

Previously Quoted

Appointment Set

Manual Call Back

Agent Requested Do Not Call

Corporate

Disconnected Number

Ignore flags

Only include records with flags

Exclude records with flags

Calculate Records

Mark records as part of this campaign

Campaign Printing Options:

Print sorted by Zip Code

Print sorted by Business Name

RelEvent Custom Marketing Letter (Retailers)

Print Save Campaign

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

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