



Order Form: **Nationwide Insurance 2012**

Agency Name

Street Address

City

State

Zip

Agency Phone Number

Email Address

Agent's First Name

Agent's Last Name

Agent's Direct Number

Agent's Cell Phone

**Nationwide Exclusive Products, Services and Pricing** – Make your selection by checking the appropriate box

**ClearData - RelEvent Web Based Sales Platform**

- RelEvent Base System - \$47 per month **After Co-Op - \$23.50 per month**
- RelEvent Base System with X-Dates - \$99 per month **After Co-Op - \$49.50 per month**

**ClearData - Exclusive Nationwide Commercial Appointments** – Set Using Nationwide Underwriting Questionnaire

You select the geographic area and the classes of business and we make the calls

If an appointment cancels we replace it FREE - GUARANTEED

- Month to Month Package** - \$379 per month  
3 Appointment Package  
**After Co-Op \$94.75**  
*Package Includes: Underwriting Questionnaire, Appointment Confirmation and Appointment Cancellation Guarantee*
- New for 2012 - 3 Month Program** – \$999 (11% Discount) **Best Value**  
9 Appointments  
**After Co-Op Price - \$249.75**  
*Program Includes: Underwriting Questionnaire, Appointment Confirmation and Appointment Cancellation Guarantee*

Month to Month Package not available in all states

Additional Appointments - available providing your profile permits the increased calling activity.

**ClearData - Special Projects for Agents**

Do you have a special need or project that you want to tackle? We can help. Give us the details and let us help you devise a custom solution. Pricing based on project details.

**Nationwide Corporate – Custom Projects**

All of ClearData's products and services are customizable and available on a regional/enterprise scale.

Please contact Bill Kossack at (412)-793-3344 x100 for details.

---

### Complete this section if you selected an appointment setting package

Start Date \_\_\_\_\_

Major Carriers Represented

---

Additional Info

---

#### How did you hear about us?

Advertisement    Colleague/Friend    Email    Internet

#### Payment Method – Credit Card Only (Check One)

MasterCard    Visa    Discover    Amex

#### 3 Month Program Payment Terms

Bill me all at once    Bill me in 3 monthly installments

---

Credit Card Number

---

Expiration Date

---

Zip code of card

---

Print Name EXACTLY as it appears on card

---

### Appointment Setting Services Guidelines

#### System Selections

1. The agent must select at least 6 different classes of business in their profile
  - Contractors in any combination constitute 1 class of business
  - Restaurants in any combination constitute 1 class of business
  - Retail stores in any combination constitute 1 class of business
2. ClearData recommends setting the profile so that at least 350 prospects are available in the Main View of RelEvent
3. Prior to the start of the ClearData service, it is the responsibility of the agent to review the contents of the Main View of RelEvent and leave a note or flag any prospects that ClearData should avoid. This might include current customers, known bad risks, etc. It is the agent's responsibility to communicate unwanted prospects to ClearData. Please note that unwanted prospects resulting from a lack of communication from the agent are not eligible for replacement.

#### Confirming Appointments

The agent is to call the prospect within 48 hours or according to the special instructions in the "Appointment Email", to introduce themselves and confirm the appointment. If the appointment was scheduled at an inconvenient time, the agent can reschedule the appointment during the confirmation call.

### Appointment Issues

ALL appointment issues are to be communicated to ClearData within 48 hours of the originally scheduled appointment date and time. Appointment issues are defined as events, outside the agent's control, that prevent the original appointment date and time from being honored and would include, but are not limited to, events such as cancellation and time or date rescheduling. Appointment issues communicated beyond 48 hours of the original appointment date and time will render the appointment ineligible for replacement. If an appointment is rescheduled, it is the responsibility of the agent to notify ClearData of the new appointment date and time, otherwise the original appointment date and time will be considered.

### Replacement Appointment Criteria

A failed appointment is considered eligible for replacement when ALL of the following criteria have been met:

1. The prospect has been contacted within 48 hours or according to the instructions contained within the "Appointment Set" email
2. The agent has spoken directly with the contact named in the email and this contact chose not to honor the original appointment date and time
  - Simply leaving a voice mail or a message with the prospect is not sufficient grounds for returning an appointment as cancelled
  - Questioning a prospect over the phone and mutually determining a meeting is not necessary and will not qualify the appointment for replacement
3. The agent has contacted ClearData within 48 hours of the original appointment date and time and notified ClearData of an issue with the scheduled appointment

*ClearData reserves the right to contact any cancelled appointment in an effort to reschedule the appointment and/or to obtain additional information for future action.*

### Returning a Cancelled Appointment

In all cases, the cancelled appointment must be returned to ClearData via email within 48 hours of the original appointment date and time. Please reply to the original "Appointment Set" email from ClearData rather than drafting a separate email. Any appointment that has been saved and sent at a later date will not be accepted as cancelled.

### Conditions of Service

#### Monthly Appointment Setting

After the initial sign-up and billing the service will be billed on or around the first of the month and be recurring. To stop the service simply contact ClearData before the first of the next month. Once billing has occurred the service will be provided with no exceptions and no refunds will be available.

#### 3 Month Appointment Setting

After the initial sign-up and first payment the remaining payments for the program will be billed on or around the first of the next two months. If the program is stopped mid-term, before the current 3 month term is up, any and all appointments due will be forfeited. The 3 month program will also be recurring, meaning it will automatically renew for the next three months provided the agent has not notified ClearData to discontinue the program.

### Credits/Refunds

In the rarest of occasions it may be necessary to stop the service with a refund due. Should this happen ClearData will issue a refund check for the amount due, which is currently \$26 per appointment owed, and the service will be terminated. Refund rules and the amount of refund per appointment, are issued solely at ClearData's discretion, and are subject to change.

### Sharing RelEvent

ClearData and the agent will be working from the same RelEvent system. To avoid any confusion, neither ClearData nor the agent is permitted to contact a prospect that the other is working on.

### Note

Special circumstances may arise during the agent's engagement with ClearData that are not covered above. ClearData reserves the right to make an equitable decision based on the information available. ClearData also reserves the right to modify and amend the above guidelines at anytime as needed. Proper notification policies will be upheld. The guidelines are nondiscriminatory and apply to all ClearData clientele.

**We thank you for your business.**

---

**ClearData International Inc.**  
8085 Saltsburg Road  
Pittsburgh, PA 15239

Phone: 412-793-3344  
Fax: 412-793-3345  
Toll Free: 866-586-2088  
[www.myrelevent.com/nationwide](http://www.myrelevent.com/nationwide)