



ClearData's Products and Services for Nationwide Insurance 2012

ClearData has web-based commercial marketing software called "RelEvent" that many agents use to conduct, track and manage their own prospecting activities and we also offer a "commercial appointment setting service".

We will start with the RelEvent software, because we use it ourselves when we conduct our appointment setting service and it is important that you understand how it works.

The RelEvent Software

To use the software the agent first sets up in the software what we call a "profile".

- The profile consists of the agent building the geographic area they are interested and this is done by selecting all the cities (no limit) that pertain to agent
- The agent also selects all the business types (no limit) they have interest in
- Lastly the agent selects the x-date range they want to view

Once the profile is set the software automatically pulls together all those business, in that geographic area, that are coming up for renewal over the time frame specified.

From here the agent can view the prospect pool, generate marketing literature, make phone calls, add notes, set follow ups and track and manage their own prospecting activity.

The screenshot shows the RelEvent software interface. At the top, there is a navigation bar with "Main View", "Follow Up", "Profile", "Campaigns", and "Logout". The date "Thursday, January 29, 2009" and the user name "Welcome Bill Kossack" are displayed. Below the navigation bar, there are two tabs: "X-Dated Prospects" (selected) and "All Prospects". A message states "Your next follow-up is scheduled for Thursday, January 29, 2009". The main area features a "Main View" section with filters for "City" (set to "All Profile Cities") and "Class Code" (set to "All Profile Class Codes"). Below this is a table of prospects with columns for "F", "C", "N", "Owner", "Name", "City", "Rating", "# Emp", "Risk", and "X Date". The table contains 10 rows of data, each with a checkmark in the "F" column. At the bottom, there are options to "Export current page only" and "Export to Easy AdMaker", along with pagination controls showing "Select Records/Page: 10" and "Select expiration between: 30 and 120 days".

F	C	N	Owner	Name	City	Rating	# Emp	Risk	X Date
✓				Freedom Air Conditioning Ltd	Ottsville PA 18942	-5%	100 to 249	V	03/22/2009
✓				Rainey J P Co Inc	Philadelphia PA 19134	0.7690	100 to 249	V	03/01/2009
✓				Gengross Corp	Philadelphia PA 19124	1.1110	50 to 99	V	04/01/2009
✓				Pyramid Sheet Metal Co Inc	Philadelphia PA 19124	0.7870	50 to 99	V	04/01/2009
✓				Ads Electrical Contracting Co Inc	Warminster PA 18974	0.8570	50 to 99	V	03/01/2009
✓				Hollywood Oil Co Inc	Huntingdon Valley PA 19006	1.3350	20 to 49	V	05/24/2009
✓				Moeller Electric Inc	Feasterville Trevose PA 19053	0.8140	20 to 49	V	05/13/2009
✓				Reel Electric Inc	Warminster PA 18974	0.9140	20 to 49	V	05/13/2009
✓				Slope Edwin Inc	Easton PA 18040	1.0410	20 to 49	V	05/10/2009
✓				Kramer W Associates Inc	Philadelphia PA 19132	1.3100	20 to 49	V	05/01/2009

The Appointment Setting Service

When you sign up for the appointment setting service you receive a secure login to the RelEvent software. In RelEvent we have you:

- Build your geographic area
- Select your business types
- We set the x-date range at 30-75 days out from renewal

The RelEvent software will automatically pull together all those business, in that geographic area, that are coming up for renewal over the time frame specified. Once the prospect pool has been generated we have you view the pool to flag any prospects that we should avoid like current customers etc.

From here we simply call these businesses and this is how we generate your appointments.

When we make these calls we take on your identity. We use your agency name, your name, just as if we are sitting in your office.

When we get an appointment we put the details into an email and send it to you. When you get the email you simply call the prospect to introduce yourself and confirm the appointment.



Our process is customized for Nationwide. We use a questionnaire provided by Nationwide Underwriting that the prospect must pass before an appointment is set. To finish the process we call the prospect a second time and reconfirm the appointment.

*All of ClearData's products and services are provided on a MONTH-TO-MONTH basis.
There is no contract and no long term commitment.*

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