SIG – Getting the Most out of Marketing

Course Summary

The purpose of this session is to provide suggestions on how to effectively utilize the information in your database through the Marketing module. This is a fast paced session that assumes you have previously used the Marketing Module and have a basic understanding of the module. To take this session you must have the permission required to access the Marketing module.

Course learning Outcomes/Competencies

After attending this session, you will understand*:*

- ♦ *Creating and saving a Marketing Target List using various search criteria.*

- ♦ *How to identify customers based on an absence of business or coverage and coverage based on a limit amount.*

- ♦ *Customize the Results tab of a Target List to export to Excel.*

Resources*:* SIG User Guides

Course Outline

Using a Target List

Marketing Target Lists allow you to identify customers based on common criteria.

- ➢ Create Target Lists from Marketing and the Tools, Renewal List.
- ➢ Print letters and labels to customers contained in a Target List.

Cross Selling

You can transform orphan accounts into selling opportunities. The following steps demonstrate how to create X-Date Suspense. Each customer should be contacted to collect an X-Date for their Habitation policy.

- ➢ Create a Target List that includes customers with an auto policy but no Habitational.

Account Rounding

You can sell additional coverage to customers at any time or upon the Renewal of their policy based on an absence of coverage on existing policies.

- ➢ Create a Target List based on a missing coverage. For example, identify Habitational policies by companies that do not have Identity Theft coverage or

Auto Policies that do not have the Claims Protection or Accident Forgiveness endorsement.

Increasing Coverage Limits

You sell new coverage or increase limits on existing coverage to customers based on coverage's on existing policies at any time, or upon the policy's Renewal.

➢ Create a Target List based on an existing coverage limit. For example, Identify Homeowner policies with Dwelling coverage limits over $300,000 or Auto policies with Third Party Liability – Bodily Injury limits less than $1 million.

Customizing the Data in the Target List Results Tab

You can select what data to output to the Target List Results Tab to create customized Excel Reports to analyze a portfolio.

➢ Customizing Marketing Setup.

➢ Using different profiles.

➢ Exporting the data to Excel.