



Client Relationship Management and Agency Management Systems



I-Relay Product Suite

Welcome to the I-Relay experience, where cutting edge technology meets the needs of the insurance and finance industry. We at **Prospect9** look forward to working with your agency and assisting in the transition and growth of your firm. To help give you a better understanding of some features and capabilities available we have provided this introductory literature.

I-Relay is a collection of integrated applications built exclusively for the insurance and finance professional. At the core of I-Relay is a robust agency management system, an A to Z solution for insurance agencies to track prospects, clients, their book of business, and marketing capabilities to expand their business.

We invite you to see the I-Relay difference and why hundreds of agencies and producers are choosing I-Relay each and every month!



Key Benefits

I-Relay brings many exciting benefits to your agency. Below are just a few.

- Client Tracking – all lines of business
- Prospect Tracking
- Workflow Management
- Team Management – sales and support
- Group and Individual Policy Tracking
- One Database for the Whole Agency
- 100% Web-based
- Automated Downloads from More Than 400 of the Countries Most Respected GA's
- Robust Marketing Tools
- On-Line Unlimited Document Storage
- Automated Business Rules
- And Much More!



Security & Data Protection

Security of your data is at the forefront for our business model. We have built it around the industry's best security and data protection capabilities.

- 100% data encryption using 128-bit Secure Socket Layer (SSL) which protects data during transmission.
- Per User and Role Based Logins
- Tab and Field level lockdowns
- Separate, Private, and Secure Database for Each Agency
- Multi-level Firewall Implementation
- Full Nightly Backups – Weekly Off Site Storage
- Full Disaster Recovery Plan – Tested Twice Annually
- All Systems Hosted in Tier-1 Hosting Facility
- Redundant T3 and OC Internet Connections
- On-site Power Back-ups
- Annual Ethical Hacks and Penetration Testing

Workflow & Process Management

I-Relay enables your agency to work as a single team no matter how large, small, or spread out they may be. With a centralized system and varying security rights managers can effectively review staff while everyone gets a 360 degree view of the client or prospect.

- Workflow Management
- Process Management
- Activity Tracking
- History Tracking
- Automated Business Rules for Follow-up and Cross Selling
- Drip Marketing Campaigns
- Much More!





The I-Relay System® Ten Reasons Why the I-Relay System Works

- **No development time.** Licensing the I-Relay System frees up the hundreds of working hours required to take even the best program and turn it into a system; and that's assuming you get it right the first time.
- **More sales time.** Through our back office-management system, you can receive **automated case updates from more than 400 of the country's most respected General Agencies and IMO's.** Updates include: required forms, real-time underwriting requirement updates, underwriting notes, case premium information, and more. Also gives you the ability to delegate non-sales functions, thereby freeing up time to sell.
- **More responsive clients.** Over time, as the quality of your service and communication improves, we find that you need to do less selling, which translates into even more sales in less time.
- **Greater client retention.** The two biggest complaints clients have against their insurance advisor are "bad or no service" and "never hear from them." We briskly handle these two complaints through a series of pre-designed quality assurance and client contact campaigns. With those complaints resolved, client retention improves.
- **Increased referrals.** Our approach to referrals is truly unique. First, you implement our client-retention methodology. Then, with a base of happy clients, you promote referrals. With this referral-tracking system in place you not only keep track of who sends you business, but also of the people you send business to: the CPAs and attorneys who, all too often don't think to either reciprocate or think about the benefits of insurance with their clients.
- **Better organization.** The better organized you are the easier it is to manage more and more clients. With I-Relay you will always be on top of your sales, submitted cases, and everything in between.
- **More new clients.** Half of your new clients can come from people who have previously turned you down. Give us a year of helping you design drip campaigns and you will experience one of the best growth years in career.
- **Partnership.** I-Relay is different than other tools you may have used in the past. We have a dedicated post sales support staff ready to assist you with any and all of your needs. From contract signing on you will have the support you need to succeed.
- **Web-Based.** Being 100% web based gives you the freedom to access I-Relay from anywhere, at any time. This also means various access points for multi office organizations. The benefits are limitless.
- **Compliance.** As the industry becomes more and more stringent on tracking client interactions, backing up communications, and scanning documents, I-Relay can help. With specifically designed tracking tools you can be rest assured you are covered.



I-Relay – Functionality Overview

I-Relay is a comprehensive web-based client relationship management (CRM) solution providing a full range of tools necessary to market and manage a variety of client, agencies, carriers, and other relationships. I-Relay was built from the ground up for the Insurance and Finance professional to be used by a producer or group of producers in an agency to more effectively manage their sales and back office processes. Although there are varying levels of I-Relay for Brokerage Agencies and Carriers this document provides information for those interested in using I-Relay for the producer or direct to consumer level. I-Relay may be used as a stand alone tool or dynamically interact with a variety of third party insurance programs.

I-Relay is separated into modular components for ease of use. These modules include a Contact Module, Marketing Module, Reports Module, and an Administration Module.

Primary Directive

I-Relay for the producer or direct to consumer layer was intended to help the producer or agency manage its existing client base while continually recruiting qualified prospects. With direct ties to third party tools, data can be synchronized in real time to ensure that no one system has outdated information. I-Relay will help you expand, attract, acquire, and retain new business faster than ever before. Recent users report an average increase in sales of 28% within the first six months.

Key Benefits

I-Relay is capable of producing immediate and long term results by incorporating time tested marketing strategies and flexible technology. I-Relay offers you the following key benefits:

- Automated pending case status updates from carriers and brokerage agencies - saves you from having to navigate between websites or calling to verify case status.
- Notifies you automatically of new sales opportunities – terminations, lapses, rollovers, term policy expirations, and more.
- Automated tasks for follow-ups – ability to turn more opportunities into closed business.
- Automated escalations for aging of high valued policies/illustrations – close more high premium dollar accounts.
- Automated letters to your clients based on preset criteria – delivery notices, thank you letters, contract anniversary letters, lapsed policy notifications, etc.
- Contact Importing – allows you the benefit of quickly loading new contacts, auto assigning them to members of your team, automatically enrolling them in marketing campaigns, assign marketing codes, etc.
- I-Relay is accessible 24 hours a day from any internet web browser.



- Metrics and tracking – gives you total control in knowing where and how your marketing budget is being spent, how effective marketing campaigns have been, ratios-illustrations vs. application submitted, application submitted vs. placed, placed vs. nto business, and more.
- Notes and activity tracking – allows everyone on the sales team to know where a client stands, what the last discussions were, next steps, resolutions, the ability to track calls based on marketing efforts for ROI metrics, and more.
- 100% web based – no need for expensive hardware or other IT associated costs. I-Relay is accessible 24 hours a day from any internet web browser.

Contact Module

- The Contact Module provides complete contact management functionality, including:
 - Basic contact demographic information, including addresses, phone numbers, fax numbers and e-mail addresses.
 - Vitals – including medical history, height, weight, income, occupation, family history, etc.
 - Quality Indicator – an on screen “snapshot” of production information for an agent or agency, as well as total policies owned for end insured clients.
 - Relationships – the ability to tie related contacts together, such as a spouse, a business partner, children, etc.
 - Company Link – a contact may be linked to a company contact for quick reference and reporting.
 - External database search – if a contact the user is searching for does not exist in his/her data structure, the system will conduct a reverse look up through multiple internet directories and pull back matches. A selected match may be imported to automatically create a new contact record, including name, address, and phone number.
 - Sales Opportunities – Pending Business
 - Automated Paramedical and APS Ordering – status updates will automatically update your client record with the most current information available.
 - Track new business cases and proposals – Life, Long Term Care, Annuities, Disability, and Health.
 - Track all case requirements – real time data feeds from Agency Integrator – ability to take feeds from any agency management and legacy systems.
 - Sales events or case related tasks and to do's.
 - gives details on paid to dates, issue dates, end of policy dates, etc.



- Case notes – show all related notes on the case.
- History log – shows the progress through the status cycle: includes sales and case status. Illustration Requests – tracks multiple illustration requests and allows the user to tie back a selected request to the case. Illustration requests may be e-mailed or printed.
- Policy Info – all policy information about the case including the carrier, plan, agency, policy number, etc.
- Premium Info – includes fields for items such as mode, 1035 dumps, targeted premiums, table ratings, cash with application, policy fees, etc.
- In Force – allows the user to track policies after they have been placed. This section gives details on paid to dates, issue dates, end of policy dates, etc.
- Contact Sharing – any contact within the user’s environment may be shared with other users or kept private.
- Holdings – allows the user to quickly review any policy currently and previously held by a client.
- Quality Assurance – allows the organization to track quality issues, assign issues to specific users, and resolve them systematically.
- Marketing – details all of the marketing campaigns that the contact is currently enrolled in. Selecting the campaign allows the user to see where the campaign is in the life cycle, milestones, documents that are attached, etc.
- Touches – allows the organization to track phone calls, e-mails, documents that were sent to the client, etc. This is a permanent record section of the contact that does not allow user editing.
- Notes – allows the user to track generic notes relating to the contact. Notes are date and time stamped with the user’s name.



My Dashboard

- My Dashboard provides complete task management functionality, including:
- An on-line view of user related tasks. Tasks may be re-sorted by event type, contact name, status, due date, or comments.
- Tasks are typically associated with a date range that is definable by the user, i.e., show all tasks that have not been completed that are due today or older.
- Ease of task management – the bottom of the task screen allows the user to easily navigate through associated tasks, complete tasks, re-assign tasks, e-mail, change due dates, etc.
- Tasks may be viewed on-line or sent to a local printer.
- Custom views based on user ID and rights may be created. They may also be public or private.
- Tasks may be manually assigned based upon activity in the sales or case process. They may also be automatically assigned to users based upon marketing campaigns or other business rules established by the organization administrator.
- Shared calendaring that provides your office with a single view. The calendaring feature also synchronizes with MS Outlook and other devices.

Marketing Tools

Marketing Tools enable the organization to query contacts based upon demographic information, set up marketing campaigns, create literature, and define business rules. Functionality under marketing tools includes:

- **List Builder** – allows the user or administrator of the organization to query contacts based upon demographic data. Any field within I-Relay may be set as criteria for the search. Once a list has been queried and built it may be exported, saved, or attached to one or more marketing campaigns.
- **Document Builder** – allows the user or the administrator of the organization to build template letters and documents. Document Builder has features similar to Microsoft Word, including the ability to add merge fields as well as change font sizes, font styles, and font colors. Documents can be run as a “one off”, they can be attached to marketing campaigns, or attached to business rules and be automatically generated based upon specific activities.



- **Business Rule Manager** – allows the organization to assign specific business rules to events. As items change within I-Relay, these automated business rules trigger action items such as tasks, e-mails, printed letters, etc. Business rules may be set for a variety of needs; an example may be for term expirations. Thirty days prior to the expiration of a term policy, a business rule may generate an e-mail to the client letting them know the policy is about to expire, and then three days later assign a task for the producing agent to call the client to follow up and to schedule an appointment.
- **Marketing Campaign Manager** – easily facilitates the use of automated “drip marketing” and/or blast targeted, specific marketing campaigns, thereby reducing the acquisition costs of obtaining new clients. Documents built within the Document Builder may be attached, various rules may be associated, and a detailed client list may be used in combination.

Reporting

I-Relay uses combined technology for reporting that allows for HTML as well as Microsoft Excel views. The Reports area allows a user to query and run reports to obtain information that has been entered into I-Relay. Numerous reports can be created and run including:

- Sales Pipeline Report
- Sales Summary Report
- New Prospect Report
- Sales Lost/Sold Report
- Lead Aging Report
- Pending Business Report
- Customized reporting is available upon request. A Report Writer, allowing the administrator of the organization to build and maintain custom reports, has just been released.



My Profile

The My Profile area is where you, as the agent, store and maintain your personal/business related information. Items in this area include:

- User Name and Password
- Contact Information (can be merged into marketing letters)
- Mailing Address (can be merged into marketing letters)
- E-mail Signature
- State Licensing Information
- Carrier Appointment Information
- Continuing Education Information

Site Administration

- The administrator of an organization has specific, inherent rights that allow the user to manage the account from a global perspective. Additional functionality that the administrator has includes:
 - User Management – the ability to add, delete, and manage user access.
 - Carrier Management - the administrator may manage the carriers the organization interacts with. This entails the carriers products, website address, username and password for access into the carriers website, general notes and much more.
 - General Agency Management – because some organizations are contracted with multiple General Agencies, this section allows the administrator to manage such critical data as the carriers they represent, lines of business, expertise, website address, username and password for access, general notes, etc.
 - Re-assign Clients – at times it becomes necessary for an organization to re-assign clients based upon strategic business needs or agent turn over. The administrator can easily re-assign clients based upon criteria or round robin the clients to all remaining sales staff.
 - Site Address – allows the administrator to manage general information about the organization, including the organization's address, phone numbers, business rule exclusions, external integration with third parties, logo management, etc.



Sales Tools

Allows for a repository of sales related tools. These tools may be as simple as third party links or physical integration. An organization may choose the links and information stored within this area. Today, I-Relay has the ability to link to tools various quoting and forms engines, and I-Relay's own Sales Vault for a variety of sales concepts and ideas.

I-Relay Supported Product Lines

I-Relay was designed to allow you to manage all of your business in one location regardless of product line or where it was placed. With independent details screens for each product line you will be rest assured you will have the ability to capture the necessary information on all of your sales, policies, and accounts.

Whether it be life, long-term care, disability, health, annuities, or property and casualty I-Relay now allows you to manage and market these products with ease.



Customer Testimonials

Michelle Y. of Salt Lake City, UT increased her business by 40% within the first six months!

"I-Relay's powerful marketing tools helped me streamline my approach and reach out to more potential customers than I ever could before."

Charles S. of Seattle, WA cuts ten hours a week out of his schedule through automated case downloads from his General Agencies!

"I cant believe how easy it is. I walk in every morning in amazement that all of my pending business is updated and I know exactly where I stand on each case"

April C. of Naples, FL has used three systems in the past four years and can't believe how easy to use I-Relay is and how fast her agency has adopted it.

"I am very pro- insure socket and now I am telling everyone about it!"

Byron R. Little Rock, AR has worked for a P&C agency for the past five years and had no way to track his Life and Health business.

"I-Relay has finally given me a way to manage and grow a unique part of my business faster and easier than I had ever thought possible".

Cathy C. Exton, NH moved to I-Relay after not receiving any customer support from her old system provider.

"I-Relay provides the best customer service I have ever had from a technology company. They are all ten's in my book".

Trish G. Overland, TX didn't have a good method of keeping in touch with her clients on a consistent basis.

"With I-Relay I now have an easy to use and automated way to keep in front of my clients. My referrals have increased three fold over last year".



Additional Information

For a self guided demonstration please visit us at www.i-relay.com

For a personalized demonstration, additional questions, or to sign up for I-Relay please call Roy Goodart at 800.908.9707.

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