

ROBO-Agent

for Allstate/Alliance Agents

A Power Prospecting Tool for New Business

RoboAgent is a **Power Prospecting Tool** for NEW Business. It is software that enters in specific information like home value into a Web-based quotation system; the resultant quote has different policy costs for each prospect in your leads list (Client specific). The print output can be completely defined by the Agent (Agency specific). Thus RoboAgent is far more effective than mail merge because of the Agent and Client specific output.

Generate more revenue (aka grow your Book) with RoboAgent. Those Agency and Client specific quotes are to be mailed on a regular basis. The result is the prospective new clients call you either initially or when the need arises because you and your Agency are the first thing that comes to his mind. You have built a relationship because of those regular mailings. The costs are specific to his/her situation:

- ⊕ Cost of his/her home,
- ⊕ Cost relative to his/her vehicle,
- ⊕ Cost relation to his/her condo value &/or,
- ⊕ Cost relative to his property

Those premium costs are per the value of his/situation and closer to the final quotation. Option set (as default) to store on Alliance for future retrieval

Gone are the hours of manually inputting leads data into Web-based quotation system. A Homeowners quote take RoboAgent 20 to 40 seconds per quotation versus 15-20 minutes when done manually. RoboAgent costs are one-time versus 32 quotes per day for a person one sees that RoboAgent pays for itself in the first mailing.

Our new Quick Start option allows you to generate quotes in 4 minutes or less. Quick Start and our Leads Conditioner utility compensates for Web-based quotation system's required format requirements.

RoboAgent will prospect for:

- ✓ Homeowners
- ✓ Condo
- ✓ Rental
- ✓ Auto (from 1990)

Independence:

- ◆ To select what ever **lead source** you desire (as long as leads data is in "csv" format).
- ◆ Adapt to **changes Web-based quotation system** via "click" option button or do a new template via drag-and-drop methodology.
- ◆ **Create print output per the Agent's desire** with the appropriate premium costs.

What is your time worth?

Data Entry for a 2,000 lead mailing will cost approximately \$ 2,500.00/each in labor alone versus \$ 249.95 RoboAgent (15 minutes per lead, 8 hours/day-62.5 Man Days times @ \$5/hour).

To be effective this needs to be done with frequency which means a quarterly mailing of 2,000 leads would cost you \$ 10K per year in labor alone.

Set-it-and-forget-it

RoboAgent generates canvassing quotes automatically, unattended. This fees you and your employees to do revenue generating activities. RoboAgent is:

- ◆ Like 4-5 additional employees
- ◆ A 7/24 employee
- ◆ RoboAgent does not require:
 - Vacations, sick days, personal days
 - Benefits, no 401K
 - Raises
 - Breaks
 - Additional space
 - Does not complain
- ◆ Fixed salary to One-Time License fee



<http://www.bluesmokesoftware.com>
sales@bluesmokesoftware.com

Telephone (708)671-0100 Extension #222

- ◆ RoboAgent by default skips leads marked “Current Customer” as noted by files that are “scrubbed”.

RoboAgent features

- Automatically enters in leads data into Alliance Web-based quotation system.
- Automatically saves information including premium costs per the perspective client home value/Auto/Condo value/Renter Value.
- Allows print output to be Agency and Client specific.

Print/E-Mail

- ◆ Specific to your Agency
- ◆ Specific to your client
- ◆ Totally definable by you the Agent
- ◆ Format
 1. Letter
 2. Post Card
- ◆ Print on your PC (connected to Alliance)
- ◆ Print on your PC non-Alliance (RoboPrint)
- ◆ Alternative Output to Printer and/or Bulk Mail service:
 1. “PDF” module finished quotes to a “pdf” file (additional charge module) \$ 99.95.
 2. Special Export Feature to “csv” file (additional charge module) \$ 99.95.
 3. RoboPrint (one included with RoboAgent, additional chargeable @ \$ 99.95/per Licensee or \$ 200/per non-licensee of RoboAgent).
- ◆ E-Mail as “html” (default) or “pdf”.

RoboAgent Quick Start (quoting in less than 4 minutes)

- ◆ Input Template **given**
- ◆ Leads data does not need to be Alliance compliant (column sequence)
- ◆ Most Leads data “conditioned” per Alliance format requirements automatically

RoboAgent Advanced option

- ◆ Template/Script **definable** by “drag-and-drop”.
- ◆ Leads data does not need to be Alliance compliant (column sequence).

- ◆ Leads data “conditioned” per Alliance format requirements is an optional step.
- ◆ No Excel expertise needed to do “Joins” and “Splits” of columns available - an additional step.

Getting Started

1. Review Training Video (call with questions)
2. Test with sample leads for Proof-of-Concept
3. Get leads “csv” files
4. Download RoboAgent
5. Run RoboAgent under 15 calendar day evaluation license (limit 10 prints per session)
6. License RoboAgent One Time charge) for unlimited prints - **NO Charge per item.**

Support options

- ✦ WEB based Training videos a 7/24 reference
- ✦ E-Mail support@bluesmokesoftware.com
- ✦ No additional charge telephone support during 15 day evaluation period plus to 60 calendar days after One Time License payment between the hours of 8AM to 5PM CST Monday thru Friday.
- ✦ RoboAgentII Program updates (no additional charge) for licensed users for 15 day evaluation or 60 calendar days after one-time license.
- ✦ Telephone Support/updates beyond days 61 requires Red Carpet subscription at \$ 65/year; 8AM to 5PM CST Monday thru Friday.

Software Updates

- ✦ No additional charge for Red Carpet subscription users
- ✦ Updates straight forward
- ✦ Manual check, click update button “update now or later” Yes or No”
- ✦ Automatically checks every month, message either RoboAgent is current or updates are available “update now or later” “Yes or No”

Requirements

- ✦ Agent owned “thumb drive” or “C” hard drive.
- ✦ Allstate owned PC or Agency Choice Technology PC with access to Alliance
- ✦ Microsoft Excel
- ✦ .Net Framework 2.0

