Chapter 7

Opportunities

IN THIS CHAPTER

- ***** Opportunities
- * Identifying the Labels to Display on the Client Opportunities Screen
- * Modifying or Adding Buying Modes
- * Contact Roles
- * Adding Programs
- * Adding Questions and Answers (Details)
- * Determining and Adding Grades
- * Adding Opportunities Questions and Answers to the Branches

Opportunities

The Opportunities screen displays prospective sales data. A separate Opportunity should be set up for each Line of Business or Package Policy. It is up to each organization to define the use of opportunities to best fit their need. Opportunities may be customized for each Branch added to your Organization.

To modify, click the **SETUP** link on the Utility menu, and click on **Opportunities** on the Setup Console. The **branches** and **templates** tabs are automatically displayed. Each page has navigation controls located at the top center of the page that provides the ability to navigate to different pages should multiple pages exist.

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and Minimize Details	Branch Name	Address	City	St./Prov.	Zip/Postal	Remove
Color Schemer	Acme Branch	1432 Peyton Ave	Chino Hills	CA	91709	B
Lookup Management	American Insurance Professionals, LLC.	1792 Jody Drive	Marietta	GA	30066	
Opportunities 🛛 📝	Annapolis Insurors	4479 Pontiac Lake Rd Ste 2	Waterford	IA	48328	F
Branches	Archuleta Branch	12 Main Street	Brea	CA	92821	-
Buying Modes 🛛 🕏	Archuleta L Branch	4479 Pontiac Lake Rd Ste 2	Waterford	IA	48328	-
Contact Roles	Atlantic Branch	7000 Main Street	Brea	CA	92821	-
Details	Atlas Advisory Group	145 S. State College	Brea	CA	92821	-
Grades	Barranca Insurance Services, Inc.	9121 Haven Ave. Suite 100	Rancho Cucamonga	CA	91730	
Labels 📝	BBC Insurance - Escondido	123 Main Street	Escondido	CA	92025	-
Print Blank Forms 🛛 📝	BBC Insurance - Vista	922 S. Santa Fe Avenue	Vista	CA	92084	B
Programs						
Document Templates					templates	branche
Security Administration						

Identifying the Labels to Display on the Client Opportunities Screen

To customize the opportunities, first identify what the labels should be on the client opportunities page. To see the current labels at Client Opportunities level, first search for a client by clicking on the **SEARCH** link located

on the Client menu. Select any client by clicking the **Details** icon and then click the **OPPORTUNITIES** link. Click the **[Add New Opportunity]** link on the upper right side of the screen to display the Lines of Businesses to choose from. After selecting the lines of business the opportunity is added.

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Client Na	ame: Bea	utiful World of Flowe	ers					• Co	ommercia	Account
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Details	Assign	Policy Type Line of Business	User / System Grade (Score)	Status	Updated By Updated Date	Commission	X-Date BORDate	Program	R	emove
>	2	Monoline Commercial Property	Lump of Coal/Lump of	0 - N/A	Mary Oberleitner 10/20/2005	\$0.00	//	-	2	B

The Current Default Labels are shown on the screen below in Bold.

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CLIENT PROFILE OPPO	RTUNITIES MARKETING	POLICIES CLAIMS	SERVICING ATTACHMEN	ITS ACTIONS TRANSAC	TIONS DELIVERY T-LOG
Client Name: Beau	titul World of Flowers				Commercial Accou
Billing Co:	Unassigned	Mode:	New		
Policy Number:	Unassigned	Status:	0 - N/A	×	
List	Print	History	Market	Save Changes	
Qualitying Information:	2010				
X/BOR Date:					
Program:	\checkmark				
Buying Mode:					
Opportunity Criteria:					
Potential Profitability: 12	? - less than \$1000		\checkmark		
Proximity: 20) - less than 5 miles from a	gency office			
Presentation to Personnel: 25	5 - Direct Presentation to de	cision maker			
Pressure on 25 Prospect: 25	i - Definitely will adopt new	product/provider	\checkmark		
DUI?: 0	- Yes		\checkmark		
Opportunity Status:					
Total: N/.	Α				
System Grade: Lur	np of Coal				
User Grade: Lu	mp of Coal 🛛 💟				
Commission:					
Contact:				[Add New]	
Details Contact		Role		Delete	
	Please clic	k 'Add New' to insert new	record(s).		

If a label change is needed, use the table provided below to determine the new labels.

Current Labels	New Labels
Qualifying Information	
Opportunity Criteria	
Opportunity Status	
Contacts	

Modifying these labels is done in Opportunities Setup, selecting the Labels link on the Setup Console will show the Current Labels. Notice that the Add New link is not an option. To activate this option at least one of

the 4 labels would need to be removed by clicking the **Remove** icon on the right of the label. It is easiest to edit the Label by clicking the **Details** icon.

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Actions		Qualifying Information		3/3/2004	B
Color Schemes	, P	Opportunity Criteria		11/12/2002	Ē
Lookup Management		Opportunity Status	-	11/12/2002	
Opportunities		Contact		11/12/2002	B
Branches					
Details Grades Labels Print Blank Forms Programs Document Templates Security Administration					
User: Mary Oberleitner [Admini	strator] Sign	ed On At 10/21/2005 10:38:39 AM CST		Status:	In A Meeting

Edit the Label and a description may be entered to identify the intent of the label for future reference. Click the Save button to store the modification or the Close button to abort any changes. Once all Labels have been changed, access the Opportunity created earlier to make sure the Labels are where they're intended to be.

CHAPTER 7

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Expand Minimize	Details	Labels	Labels.	
 Actions Color Schemes Lookup Management Opportunities Branches Buying Modes Contact Roles Details Grades Labels Print Blank Forms Programs Document Templates Security Administration 		Qualifying Information Opportunity Criteria Opportunity Status Contact	Label: Description:	Qualifying Information

Notes

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Modifying or Adding Buying Modes

Buying Modes are used to identify the buying mode of the suspect and are utilized on the Client Opportunities qualification tab. The drop-down box contents has some defaults but may be modified prior to use. Once a mode has been used, it is not recommended that it be changed.

nderwriting policy info	assignment attachments	s actions qualification	history trans	ctions	Claims Summary of in
Branch:	Atlantic Branch	Policy Term:	10/2 10/2	/2005 /2006	12:01AM CST 12:01AM CST
Policy Type:	Monoline	Coverage Te	2777-	,	
Issuing Co:	Unassigned	Stage:	Oppo	tunity	
Billing Co:	Unassigned	Mode:	New		
Policy Number:	Unassigned	Status:	0 - 1	/Α	\checkmark
List	Print	History	Market		Save Changes
Program: Buying Mode: Opportunity Criteria Potential Profitability: Presentation to Pressure on Prospect DUI?; 0 Opportunity Status: Total: N/	Annge in Management/Owne ownsizing rowth we Business we Venture ale of company 5 - Definitely will adopt new - Yes A	rship ce ker product/provider			
System Grade: Lui	mp of Coal				

If a Buying Mode change is needed, use the table provided below to determine the new buying modes.

Current Default Buying Modes	New Buying Modes
Change in Management	
Downsizing	
Growth	

Modifying the Buying Modes is done in Opportunities Setup, selecting the Buying Mode link on the Setup Console will show the Current Buying Modes. Notice that the Add New link is available which allows the addition of new buying modes. Click the Add New link to add a new buying mode or click the **Details** icon to modify an existing one. Clicking the **Remove** icon will allow the removal of the Buying Mode.

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Use the navigation below to						
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Expand Minimize	Details	Buying Mode	Description	Date Created	Remove	
Actions		Change in Management/Ownership	-	11/12/2002	E-	
Color Schemes		Downsizing		11/12/2002	B	
🗔 Lookup Management		Growth	Acquisition mode	11/12/2002	E I	
Opportunities		New Business	· .	12/5/2003	B	
Branches		New Venture	Start up Company	3/16/2004	E	
Buying Modes		Sale of company	-	4/27/2004	B	
Contact Roles						
Details				ь	uying mode	
Grades						
Labels						
Print Blank Forms						
Programs						
Document Templates						
Security Administration						
	-					
			D (
Buyi	ng Mode.					
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Close Save

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Contact Roles

Contact Roles are used to identify the role of each contact added to the **OPPORTUNITIES** > **qualification** tab. The drop-down box contents have defaults but may be modified prior to use. Once a role has been used, it is not recommended that it be changed. Only four Contact Roles may be added. To access the Contact roles, click the **[Add New]** link for the Contacts at the bottom of the **qualification** tab.

Contact:		[Add New]
Details Contact	Role	Delete
	Please click 'Add New' to insert new record(s).	

The **Add New Contact(s)** pop-up window allows the contacts added on the Client contacts tab to be associated with the Opportunity. Use the **Contact Role** drop-down box to identify each contact's role.

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OPPORTUNITIES MARKETING		CEDVICINO I ATTACUMENTO	
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ram: 🔽			noveuro
ode:	Add New Contact(5)	
teria:	Contacts:	Henry Brant	
ntial 11ty: 12 - less than \$1000	Contact Role:		
nity: 20 - less than 5 miles from		My Contact	el Save
n to nel: 25 - Direct Presentation to		Influencer Check Writer	
e on lect: 25 - Definitely will adopt n		Decision Maker	
UI?: 0 - Yes			
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ade: Gold			
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CHAPTER 7

If modification to the Contact Roles is required use the table below to determine what the new roles will be:

Default Contact Role		
Decision Maker		
Check Writer		
My Contact		
Influencer		

Modifying the Contact Roles is done in Opportunities Setup, selecting the Contact Roles link on the Setup Console will show the Current Roles. Notice that the Add New link is not available if four roles already exist. Removing a contact role will activate the Add New link to add a new role or click the **Details** icon to modify an existing one. Clicking the **Remove** icon will allow the removal of the Contact Role.

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Actions		My Contact	-	4/29/2004	En l
Color Schemes		Influencer	-	11/12/2002	
Lookup Management	P	Check Writer	-	11/12/2002	B
Opportunities	P	Decision Maker	-	3/22/2004	
Branches Buying Modes Contact Roles Details Grades Labels					contacts

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ation. ×		🛎 https://nexweb16.nexsure.com - Contact Roles - Micros 🔳 🗖 🗙		
		Contact Roles.	[0r	der] [Add New]
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	P		4/29/2004	B
	P		11/12/2002	
	*		11/12/2002	
	*		3/22/2004	
		Close Save		contacts

Notes



Adding Programs

Programs are used to identify if an opportunity is for Program business. Programs are located on the Opportunities Qualification tab. The drop-down box for these programs are populated by each Organization and then associated with each Branch in the Organization as needed.

	nch	Policy Term:	12/ 12/	15/2005 15/2006	12:01AM CST 12:01AM CST
Policy Type: Monoline		Coverage Ter	·m:		
Issuing Co: Unassigned		Stage:	Opp	ortunity	
Billing Co: Unassigned		Mode:	Nev	,	
Policy Number: Unassigned		Status:	0 -	N/A	V
List Pri	nt	History	Market		Save Changes
Program: Buying Mode: Auto Parts Protential Contractors Profitability: Home Builders Prostimity: Restaurants Restaurants Prostimity: Retail Sales Presentation to Trucking Personnel: Pressure on Pressure on Pressure on Production Pressure on Pressure on Pressur					

Modifying the Programs is done in Setup and selecting the Programs link on the Setup Console will show the Current Programs. No default Programs are added to any Organizations. To add a new program, click on the Add New link on the upper right side of the screen.

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SEARCH	ORGANIZATION	REPORTS		Bookmarks: E	xpand Add Remove Selec
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	programs				
xpand Minimize	Program 8	Summary	📢 Showing Page 1 o	f 2 🕨	[Add New]
Actions	Details	Description	Date Created	Status	Remove
Color Schemes		Auto Parts	02/18/2004	Active	B
Lookup Management		Auto Parts Program	02/17/2004	Active	E
t Opportunities		Bee Keepers	10/06/2003	Active	B
Print Blank Forms		Car Dealer	11/04/2003	Active	B
Programs		Contractors	09/15/2003	Active	B
Document Templates		Engineers	03/03/2004	Active	B
Security Administration		Funeral Home	03/16/2004	Active	B
		Home Builders	11/04/2003	Active	B
		Lumber Suppliers	11/04/2003	Active	B
		Oil Pipeline Risks	03/26/2004	Active	E
		Recycling	04/27/2004	Active	B
		Restaurants	02/18/2004	Active	E
		Retail Sales	11/14/2003	Active	B
		RV Programs	05/05/2004	Active	E
		Trucking	11/04/2003	Active	

Enter the description of the Program or Program name and leave the Status as Active. Click the Save link on the bottom right to add the new program or the Cancel link to abort.

ograms					
Program §	Summary	И«	Showing Page 1 of 2 🕨		[Add New]
Details	Description	Date Crea	ated	Status	Remove
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*	4			Active	E
>	P Add A Now Dr		nessure	Active	E C
>	d Add A New Pr	oyraili		Active	E
P	c Description:	Barbers and Hair Sa	lons	Active	E C
*	E Status:	Active 🔽		Active	E .
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Click the **Details** icon for the newly added Program to associate with the Branches.

Barbers and Hair Salons	10/24/2005	Active	E I
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Click the Add New link on the right side of the Associated Branches screen to choose a Branch to associate with the new program.

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Expand Minimize Actions Color Schemes Lookup Management	details Program Details Description: Status: .	Barbers and Hair Salons Active				[Ba	ck] [Edit]
Print Blank Forms	Associated branches						[Add New]
D Brograms	Details Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
Document Templates	There are no branches	associated to this progr	am. Please click Add N	lew.			
Security Administration							details
							program

The Effective and Expiration dates are to be used to identify the Program time frame.

https://nexweb16.nexsure.c	om - Associate A Bran 🔳 🗖 🔀
Associate A Branch	ne sure
Branches:	Atlantic Branch 🔽
Effective Date:	
Expiration Date:	
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Print Blank Forms	Detaile	Branch Name	Territory Name	Region Name	Eff Date	Evn Date	Statuc	Remove
Programs Document Templates		Atlantic Branch	Atlantic Territory	Atlantic Region	Linbuc	Lup: Ducc	Active	
Security Administration								details
							_	program

To inactivate a program, click the **Details** icon on the Branch association to display the Branch details.

programs		
details		
Program Detail	https://nexweb16.nex	sure.com - Bra 🔳 🗖 🔀
Descr	Branch Details	ne sure
Associated Bra	Region Name:	Atlantic Region
hysociated bra	Territory Name:	Atlantic Territory
Details Branch Nan	Branch Name:	Atlantic Branch
💱 🛛 Atlantic Br	Effective Date:	
	Expiration Date:	
	Status:	Active 🔽
		[Cancel][Save]
	🛃 Done	🔒 🥑 Internet

Change the status drop-down box to Inactive and click the **Save** link located at the bottom right of the window.

Branch Details	ne sure
Region Name:	Atlantic Region
Territory Name:	Atlantic Territory
Branch Name:	Atlantic Branch
Effective Date:	01/01/2005 🤷
Expiration Date:	09/01/2005 🧾
Status:	Inactive 🔽
	Active Inactive

The program may be inactivated by branch. The red font indicates a program that has been inactivated.

rogra	am Details					[Bar	ck 1 [Edit 1
2	Description: Barb	ers and Hair Salons					
	Status: Acti	ve					
Associ	iated Branches					[Add New]
Associ Details	iated Branches Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Add New]
Associ Details 🐺	iated Branches Branch Name Atlantic Branch	Territory Name Atlantic Territory	Region Name Atlantic Region	Eff. Date	Exp. Date	Status Inactive	Add New] Remove

Notes



Adding Questions and Answers (Details)

The Questions and Answers for the opportunities are added under the Details link located under the Opportunities link on the setup console in Setup.

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	detalls	questions an:	swers					Lvdd
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Actions	Details	Question	Answers	Description	Value	Status	Date Created Rei	nove
 Color Schemes Lookup Management 	P	Potential			30	Active	11/12/2002	2
		· · · · · · · · · ·	less than \$1000	-		Active	11/12/2002	2 🔓
Branches			\$1000 - \$2499	-		Active	11/12/2002	2 🔓
Buying Modes			\$2500 - 4999	-		Active	11/12/2002	2 🖬
Contact Roles			\$5000 or more	-		Active	11/12/2002	2 🖶
Details			Currently Insured?	Are they currently Insure	ed?	Active	3/22/2004	B
Grades			yes	They are Insured		Active	3/22/2004	B
Labels Print Blank Forms			Yes	They are currently insur	ed	Active	3/22/2004	B
Programs								
Document Templates					a	inswers	questions	details
Security Administration								

The questions and answers are used on the **opportunities qualification** tab to determine the qualification score of the opportunity at Client level.

ne su ire					
	SEARCH ORGANIZATION				Bookmarks: Expand Add Bernove Select
CLIENT PROFILE OPPO	RTUNITIES MARKETING	POLICIES CLAIMS	SERVICING ATTACHME	NTS ACTIONS TRANSA	CTIONS DELIVERY T-LOG
Client Name: Beaut	iful World of Flowers				Commercial Accourt
Billing Co:	Unassigned	Mode:	New		
Policy Number:	Unassigned	Status:	0 - N/A		
List	Print	History	Market	Save Changes	
Qualifying Information:					
X/BOR Date:	•				
Program:					
Buying Mode:		$\overline{\mathbf{v}}$			
Opportunity Criteria:					
Potential Profitability: 12	- less than \$1000				
Proximity: 20	- less than 5 miles from a	gency office	$\overline{\mathbf{v}}$		
Presentation to Personnel: 25	- Direct Presentation to de	cision maker			
Pressure on 25 Prospect:	- Definitely will adopt new	product/provider			
DUI?: 0 -	· Yes		\checkmark		
Opportunity Status:					
Total: N/J	A				
System Grade: Lun	np of Loal				
User Grade: Lu	mp of Coal 🔛				
Commission:					
Contact:				[Add New]	
Details Contact		Role		Delete	
	Please dic	k 'Add New' to insert new	record(s).		

Questions and Answers can be different for Each Branch in the Organization. Before adding to Nexsure use the Worksheets provided here to determine the questions and answers and the values. Default Questions and Answers added to each Organization that may be used if desired. The defaults are listed below. Notice that the total Maximum value for all the questions equals 100. Keeping the total of all questions to 100 makes it easier to determine scoring for the System Grades.

Default Questions and Answers:

Qu	estion 1:	Max. Value Assigned		
Potential Profitability		30		
Ans	swer:	Value Assigned to Answer:		
1.	Less than \$1000	5		
2.	\$1000 - \$2499	10		
3.	\$2500 - 4999	20		
4.	\$5000 or more	30		

Qu	estion 2:	Max. Value Assigned		
Proximity		20		
An	swer:	Value Assigned to Answer:		
1.	More than 100 miles from agency office	0		
2.	26 – 100 miles from agency office	10		
3.	5 – 25 miles from agency office	15		
4.	Less than 5 miles from agency office	20		

Qu	estion 3:	Max. Value Assigned		
Pres	sentation To Personnel	25		
Answer:		Value Assigned to Answer:		
1. Presentation two or more levels from decision maker		0		
2. Presentation one level from decision maker		10		
3.	Direct Presentation to decision maker	25		

Qu	estion 4:	Max. Value Assigned		
Pres	ssure on Prospect	25		
An	swer:	Value Assigned to Answer:		
1.	Just taking bids/incumbent entrenched	0		
2. Will need compelling value proposition to adopt		10		
3.	Will adopt based on favorable price/value analysis	20		
4.	Definitely will adopt new product/provider	25		

Use the table below to determine different Questions and Answers as needed.

Question:	Max. Value Assigned
Answer:	Value Assigned to Answer:
1.	
2.	
3.	
4.	

Question:	Max. Value Assigned
Answer:	Value Assigned to Answer:
1.	
2.	
3.	
4.	

Question:	Max. Value Assigned
Answer:	Value Assigned to Answer:
1.	
2.	
3.	
4.	

After determining the Questions, Answers and values, begin adding them to Nexsure by following these steps.

Click the **questions** tab to start with the Questions.

nexsure					н	ome Help <mark>Setup</mark> Logout
SEARCH	ORGANIZ	ATION REPORTS			Bookmarks: E	xpand Add Remove Selected
Use the navigation below to						
access Nexsure setup information.						
Setup Console 🛛 🖄	details	questions answers				
Evenand Minimize			K 🖣 Sho	wing Page 1 of 2 🕨	Search Filter	: [Show] [Add New]
Actions	Details	Question	Value	Status	Description	Date Created Remove
Color Schemes	P	Potential Profitability	30	Active	-	11/12/2002 🛱
Lookup Management		Proximity	20	Active	-	11/12/2002 🔓
Opportunities		Presentation to Personnel	25	Active	-	11/12/2002 🖶
Branches		Pressure on Prospect	25	Active	-	11/12/2002 📑
Buying Modes		Shops regularly	30	Active	-	11/4/2003 📑
Contact Roles		What drives buying decision?	20	Inactive	-	1/14/2004 🗟
Details	P	Acc to decision maker or gatekeeper	20	Active	-	1/14/2004 🔓
Grades Labels	🐶 '	Have commitment if expectations met	20	Active	-	1/14/2004 🔓
Print Blank Forms	*	Expertise in this type of risk	20	Active	-	1/14/2004 📑
Programs	P	Intro to account	20	Active	-	1/14/2004 🔓
 Document Templates Security Administration 					a	nswers questions details

Click the **[Add New]** link located on the upper right of the screen to bring up the New Question pop-up window. Here you should enter the Question, make sure the status is Active, enter a Max Value for the Question and any description that will remind you later what the question means. Click the **Save** button on the bottom right to store or **Close** to abort.

New Questio	n.	ne sure
Question:	Potential Profitability	
Status:	Active 🔽	
Max Value:	30	
Description:		^
		~
		Close Save

After adding all the questions, click on the Answers tab.

nexsure			Home Help <mark>setup</mark> logout		
SEARCH	ORGANIZATION	REPORTS		Bookmarks: E:	<pand add="" remove="" selected<="" th="" =""></pand>
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Setup Console	details questio	ns answers			
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Actions	Details	Answer	Status	Description	Date Created Remove
Color Schemes	*	Referral	Active	-	1/14/2004 🔓
Lookup Management					
Opportunities				a	swers questions details
Branches					
Buying Modes					
Contact Roles					
Details					
Grades					
Labels					
Print Blank Forms					
Programs					
Document Templates					
Security Administration					

Click the [Add New] link located on the upper right of the screen to bring up the New Answer pop-up window. Here you should enter the Answer, make sure the status is Active and any description that will remind you later what the Answer means. Click the **Save** button on the bottom right to store or **Close** to abort.

New Answer.		ne sure
Answer:	less than \$1000	
Status:	Active 🔽	
Description:	Commission	~
		~
		Close Save

After adding all the Questions and Answers, the next step is to match the answers to the questions by doing the following:

Click the **details** tab and click the **[Add New]** link located on the upper right of the screen to display the Questions/Answers.

nexsure			Home Help	<mark>Setup</mark> Logout
SEARCH	ORGANIZATION REPORTS		Bookmarks: Expand Add	Remove Selected
Use the navigation below to access Nexsure setup information.				
Setup Console 🛛 🗵	details questions answers			
		Showing Page 1 of 17	Search Filter: [Show]	[Add New]

From the Question drop-down box, click on the Question to assign the answers to. Then find the answers in the list and click the check boxes for all that apply to the question. Click the **Save** button to store or the **Close** button to abort.

Assignn	nent.	ne sure
Question	n: Potential Profitability	
	Answer	Status 🔼
	less than \$1000	Active
\checkmark	\$1000 - \$2499	Active 📕
	\$2500 - 4999	Active
\checkmark	\$5000 or more	Active
	less than 5 miles from agency office	Active
	5 - 25 miles from agency office	Active
	26 - 100 miles from agency office	Active
	More than 100 miles from agency office	Active
	Direct Presentation to decision maker	Active
<	Drecentation and lovel from desicion maker	Actino 🔽
		Close Save

_

Notes

Determining and Adding Grades

Grades are used to score all the answers to the questions to indicate when or if the line of business may be ready to market with your carriers. As the questions are answered at Client Opportunities level the score indicates the results and the system grade is displayed according to what was placed in setup.

Suic					HOME HELP SETUP 1
-	SEARCH ORGANIZATIO	N REPORTS			Bookmarks: Expand Add Remove S
LIENT PROFILE OPP	ORTUNITIES MARKETING	POLICIES CLAIMS S	ERVICING ATTACHMEN	TS ACTIONS TRANSA	ACTIONS DELIVERY T-LOG
lient Name: Beau	tiful World of Flowers				Commercial Ac
Billing Co:	Unassigned	Mode:	New		
Policy Number:	Unassigned	Status:	0 - N/A	~	
List	Print	History	Market	Save Changes	
Qualifying Information					
X/BOR Date:					
Program:					
Buying Mode:					
Opportunity Criteria:					
Potential 1: Profitability:	2 - less than \$1000				
Proximity: 2) - less than 5 miles from	agency office	$\overline{\mathbf{v}}$		
Presentation to Personnel: 2	5 - Direct Presentation to c	decision maker			
Pressure on 2 Prospect: 2	5 - Definitely will adopt ne	w product/provider	\sim		
DUI?: 0	- Yes		\checkmark		
Opportunity Status:					
Total: N/	A				
System Grade: Lu	mp of Loal				
User Grade: L	implot Coal 🔛				
Commission:					
Contact:				[Add New]	
Details Contact		Role		Delete	
	Please d	ick 'Add New' to insert new n	ecord(s).		

The following System Grades are the defaults added when the Organization is built.

Grade	Min. Total	Status	System Default	User Only	Hidden
Lump of Coal	0	Active	х		
Bronze	56	Active			
Silver	69	Active			
Gold	82	Active			
Platinum	95	Active			

To modify these, begin by clicking the **SETUP** link on the **Utility** menu and clicking opportunities and Grades on the Setup Console to display the current grades. Once you have used these grades, change the status of those no longer necessary to inactive by clicking the **Details** icon. To remove a grade that was never used, click the Remove link. You may also modify these Grades by clicking the **Details** icon. To add a new Grade, click the Add New link on the upper right of the screen.

nexsure					Home H	IELP <mark>Setup</mark> Logou
SEARCI	H ORGANIZATIO	n Reports		Bookr	marks: Expand	Add Remove Select
Use the navigation below to access Nexsure setup information						
Setup Console 🛛 🗵	grades requ	irements				
Furnand Minimize			Showing Page 1	of 1 🕨		[Add New]
Actions	Details	Grade	Min Total	Status	System Use Default Onl	er y Hidden Remove
Color Schemes		Lump of Coal	0	Active	*	
Lookup Management		Bronze	56	Active		E
Opportunities		Silver	69	Active		E
Branches		Gold	75	Active		B
Buying Modes Contact Roles		Platinum	95	Active		Ē
Details					r	equirements λ grades
Grades						
Labels						

After clicking the **Details** icon to modify or the [Add New] link to add a new grade, the Grades window is displayed. Enter or modify the Grade, make sure the status is Active if this grade is to be used. The Min Total is the minimum score that is required for the system grade to be displayed on the **client opportunities qualification** tab.

Grades.		ne sure
Grade:	Lump of Coal	
Status:	Active 🔽	
Min Total:	0	
Default:		
User:		
Hidden:		
Description:		~
		~
		Close Save

Only one Grade should be identified as the Default. The Grade identified as the Default will display immediately after adding a new opportunity. All Grades are automatically added to the User Grade list, so if User is selected then the Grade only displays to the User Grade list. Selecting Hidden will prevent the Grade from being displayed in the User Grade list. Make sure to enter any description that will identify why or how the grade should work.

Note: One Grade must be marked as the default.

HOW to Add Requirements for Grades

To control the System Grade results on a basis other than values, click on the **requirements** tab to add a requirement. Requirements allow the setting of a condition that a specific answer or answers must meet in order for it to qualify for a certain grade.

For example: Let's say that for some reason, you do not prefer to market business that has a potential profitability of less than \$1000. You can make a requirement that if the Point Value of the Potential Profitability answer is the same as the value for the Less than \$1000 answer, then the system grade will default to Bronze automatically.

nexsure				Home Help	Setup Logout
SEARCH	ORGANIZATION	REPORTS		Bookmarks: Expand Add	Remove Selected
Use the navigation below to access Nexsure setup information.					
Setup Console 🛛 🗵	grades requir e	ements			
Expand Minimiza			📢 Showing Page 1 of 1 🕨		[Add New]
	Details	Grade	Description	Date Created	Remove
		Platinum			
Lookup Management			Presentation to Personnel >= 10	11/12/2002	
Opportunities				require	ments / grades
Branches					
Buying Modes					
Contact Roles					
Details					
Grades					
Labels					

To add a new Requirement, click the [Add New] link in the upper right of the screen. The Grade Requirements window is displayed. Choose the Grade and the Question from the drop-down boxes.

Grade Req	juirements.	ne sure
Grade:		\checkmark
Question:		\checkmark
Value:	== 💟	
Operator:	AND 🗸	
Summary:		
		~
		~
<		
		Close Add Save

Select the condition operator from the value box.

The meanings of the operators are:

- (=) Equal to
- (>) Greater than
- (<) Less than
- (>=) Greater than or equal to
- (<=) Less than or equal to

Enter the point value to be assigned to the condition and click the Add button to add more to this question or click the Save button to add just one. When the last question has been added, click the Save button to complete the requirements for the selected grade. In the example below, the opportunity score on this question would have to be greater than or equal to 20 to display as Gold for the System Grade.

Grade Requ	uiremei	nts.	ne si	ure
Grade:	Gold			\sim
Question:	Potenti	al Profitability		\sim
Value:	>= 🔽	20		
Operator:				
Summary:		_		
Operat	tor	Requirements	Date Created	~
		Presentation to Personnel > 20	10/25/2005	
2			2	2
			Close Add S	ave

Notes



Adding Opportunities Questions and Answers to the Branches

In order to use the Opportunities added, they must be associated to the applicable branches. Use the following to associate the questions and answers with values to the branches:

Click the **Branches** link under Opportunities on the Setup Console.



Click the [Add New] link located on the upper right of the screen to bring up the Branch Template window. Select a Branch from the drop-down box, then one of the Questions and Answers added in Details. Enter the Value for the answer selected and make sure to leave the Required box checked in order to consider the question as part of the scoring.

nexsure			Home Help <mark>setup</mark> logout
SEARCH	ORGANIZATION REPORTS		Bookmarks: Expand Add Remove Selected
Use the navigation below to access Nexsure setup information. Setup Console	branches templates		
		K ◀ Showing Page 6 of 10 ▶ N	[Add New]

Branch Ter	ne sure			
Branch:	Old Dixie Insurance	Agency	r	
Question:	Proximity			Add 🔽
Answer:	More than 100 miles	s from a	gency office	Add
Max:	20			
Value:	0 Required:	 Image: A start of the start of		
Summary:				
	Answer	Value	Descript	ion 🔥
<	No reco	rd(s) fou	ınd.	~
			Close Copy	y Add Save

At the bottom of the screen, click the **Add** button to add the answer to the summary box.

Branch Ter	ne sure						
Branch:	Old Dixie Insurance Agency	~					
Question:	Proximity	Add 🔽					
Answer:	More than 100 miles from agency office						
Max:	20						
Value:	0 Required: 🔽						
Summary:							
	Answer Value	Description 🔥					
🤻 More t	han 100 miles from agency office 0						
<		>					
	Close	Copy Add Save					

Continue this process until all questions and answers have been added to this branch. Click the **Save** link when the process is complete.

After adding the questions and answers to the branch, the questions may be re-ordered by clicking the **[Order]** link. Use the drop-down box to select the order number that the question should appear as, but make sure all drop-down boxes have an assigned number.



Click the **Next** button at the bottom of the screen to store and continue to the next step, which is re-ordering the question answers. Use the **Question** drop-down box at the top to choose a question and then use the drop-down boxes to select the new numbers for the answers. Click the **Save** button to keep the changes, then select the next question and do the same until all have been re-numbered. Click the **Close** button when completed.

Setup Console 🛛 🔀	branches	https://nexweb	15.nexsure.com - Ord	er Answer - Miles 🔲 🗖 🔀			
Expand Minimize	Details	Order Answer.	otential Profitability	ne sure	Value	Status	[Order] [Add New] Date Created Remove
Color Schemes Color Schemes Cookup Management Branches Branches Contact Roles Contact Roles Contact Roles Grades Labels Print Blank Forms Programs Cocument Templates Security Administration	2 m m m m	● Order ♥ 0 ♥ 0 ♥ 0 ♥ 0 ♥ 0	Answers less than \$1000 \$1000 - \$2499 \$2500 - 4999 \$5000 or more	Description	12 10 20 30	Active Active Active Active	Initial Image: Second secon

HOW to Copy Opportunities from a Branch Previously Setup to Another

If Branches will have the same Questions and Answers, it is possible to copy from a Branch previously setup to one that has not been setup by doing the following:

Access the **branches** tab as in the steps above and click the Add New link located on the upper right side of the screen. Choose the branch that needs to be setup, click the **Copy** button at the bottom of the pop-up window screen.

Branch Te	mplate.	ne sure
Branch:	ABC Branch	\checkmark
Question:		Add
Answer:		Add
Max:	-	
Value:	Required: 🔽	
Summary:		
		~
		~
<		
		Close Copy Add Save

From the **Branch** drop-down box on the Existing Branch Templates window, select the Branch to copy the opportunities setup from. Click the **Copy** button at the bottom right of the window to complete the process.

Existing Branch Templates.						
Branch:	At	lantic Branch			\checkmark	
Question: Potential Profitability						
Order		Answer	Value	Description	~	
0	*	less than \$1000	12			
0	*	\$1000 - \$2499	10			
0	*	\$2500 - 4999	20			
0	*	\$5000 or more	30		<	
				Back	Сору	

Notes

