

Chapter 7

Opportunities

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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.

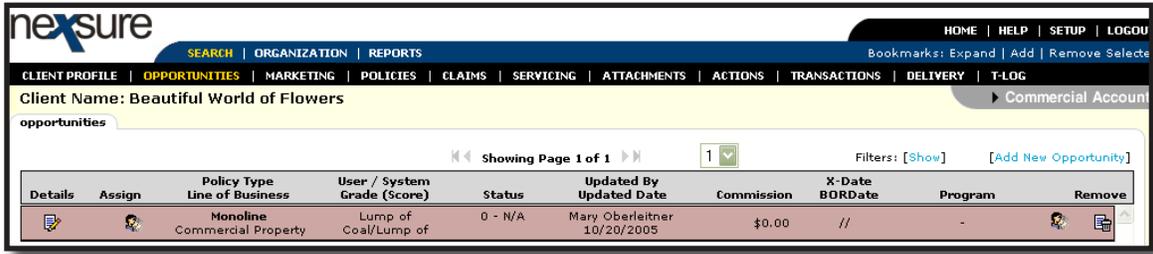
The screenshot shows the Nexsure web application interface. At the top, there is a navigation bar with 'HOME | HELP | SETUP | LOGOUT' and 'SEARCH | ORGANIZATION | REPORTS'. Below this is a 'Setup Console' sidebar with a list of expandable menu items: Actions, Color Schemes, Lookup Management, Opportunities (expanded), Branches, Buying Modes, Contact Roles, Details, Grades, Labels, Print Blank Forms, Programs, Document Templates, and Security Administration. The main content area is titled 'branches' and 'templates'. It displays a table of branches with the following data:

Details	Branch Name	Address	City	St./Prov.	Zip/Postal	Remove
	Acme Branch	1432 Peyton Ave	Chino Hills	CA	91709	
	American Insurance Professionals, LLC.	1792 Jody Drive	Marietta	GA	30066	
	Annapolis Insurors	4479 Pontiac Lake Rd Ste 2	Waterford	IA	48328	
	Archuleta Branch	12 Main Street	Brea	CA	92821	
	Archuleta L Branch	4479 Pontiac Lake Rd Ste 2	Waterford	IA	48328	
	Atlantic Branch	7000 Main Street	Brea	CA	92821	
	Atlas Advisory Group	145 S. State College	Brea	CA	92821	
	Barranca Insurance Services, Inc.	9121 Haven Ave. Suite 100	Rancho Cucamonga	CA	91730	
	BBC Insurance - Escondido	123 Main Street	Escondido	CA	92025	
	BBC Insurance - Vista	922 S. Santa Fe Avenue	Vista	CA	92084	

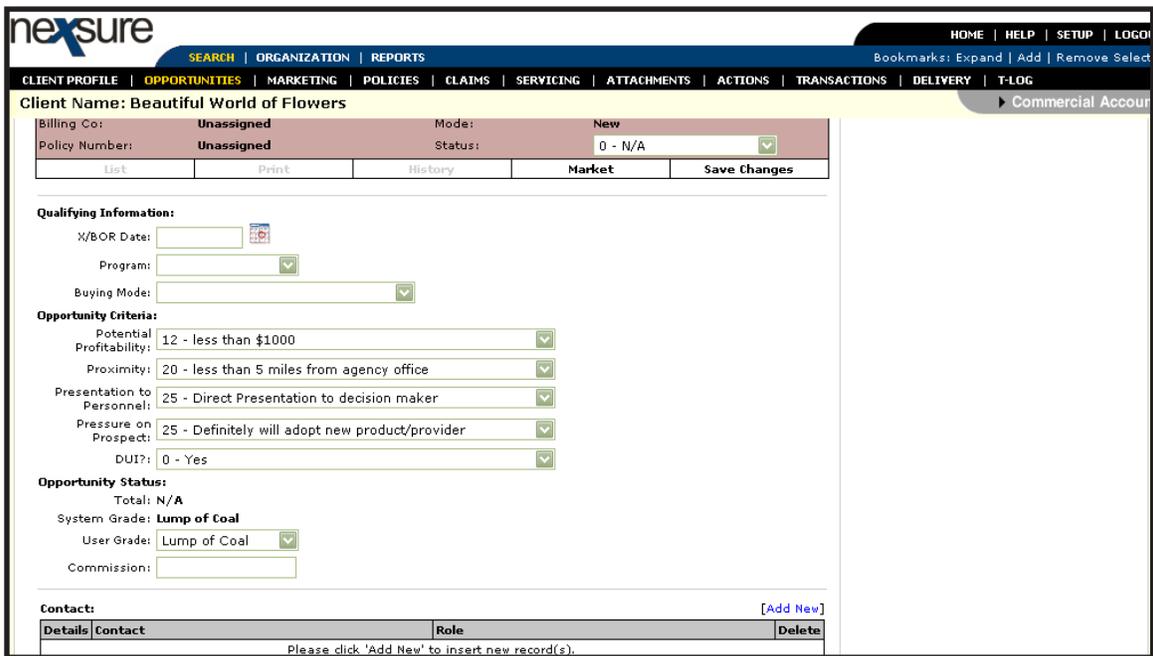
Navigation controls at the top of the table include 'Showing Page 1 of 10' and an '[Add New]' link. At the bottom right of the table area, there are tabs for 'templates' and 'branches'.

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.



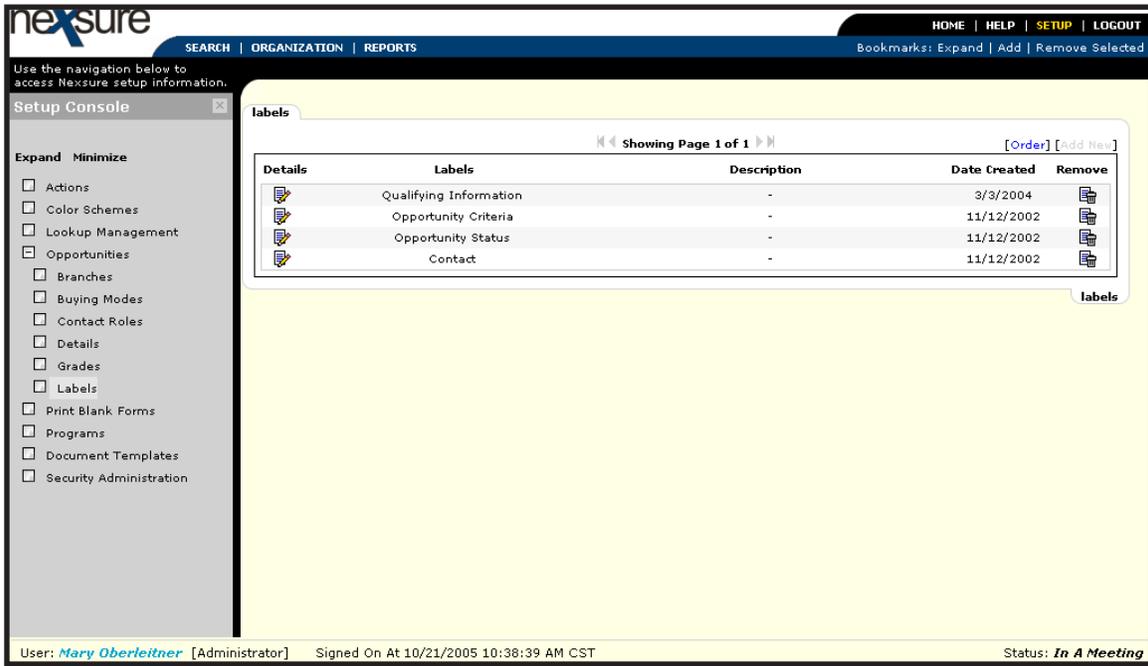
The Current Default Labels are shown on the screen below in Bold.



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.



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.

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.

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.

The screenshot shows the Nexsure Setup Console interface. On the left is a 'Setup Console' sidebar with a list of expandable categories: Actions, Color Schemes, Lookup Management, Opportunities, Branches, Buying Modes, Contact Roles, Details, Grades, Labels, Print Blank Forms, Programs, Document Templates, and Security Administration. The main area displays a 'buying mode' table with the following data:

Details	Buying Mode	Description	Date Created	Remove
	Change in Management/Ownership	-	11/12/2002	
	Downsizing	-	11/12/2002	
	Growth	Acquisition mode	11/12/2002	
	New Business	-	12/5/2003	
	New Venture	Start up Company	3/16/2004	
	Sale of company	-	4/27/2004	

Navigation controls include 'Showing Page 1 of 1' and an '[Add New]' link. A 'buying mode' label is visible at the bottom right of the table area.

The 'Buying Mode' configuration dialog box contains the following fields and controls:

- Buying Mode:** A text input field.
- Description:** A larger text area with scrollbars.
- Buttons:** 'Close' and 'Save' buttons.
- Logo:** The Nexsure logo is located in the top right corner.

Notes

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).			

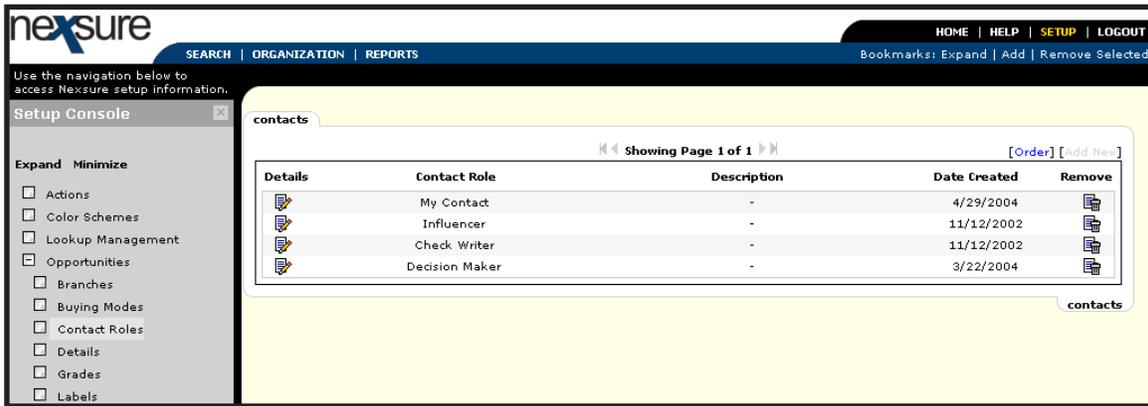
The **Add New Contact(s)** pop-up window allows the contacts added on the Client contacts tab to be associated with the Opportunity. Use the **Contact Role** drop-down box to identify each contact's role.

The screenshot shows the 'Add New Contact(s)' pop-up window in the Nexsure application. The window title is 'https://nexweb16.nexsure.com - Add New Contact(s) - ...'. The main content area has a yellow background and the Nexsure logo in the top right. It contains two dropdown menus: 'Contacts:' with 'Henry Brant' selected, and 'Contact Role:' with a dropdown menu open showing four options: 'My Contact', 'Influencer', 'Check Writer', and 'Decision Maker'. There are 'Cancel' and 'Save' buttons to the right of the dropdowns. The background shows a form for 'Beautiful World of Flower' with various fields and a 'Please' button at the bottom.

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.



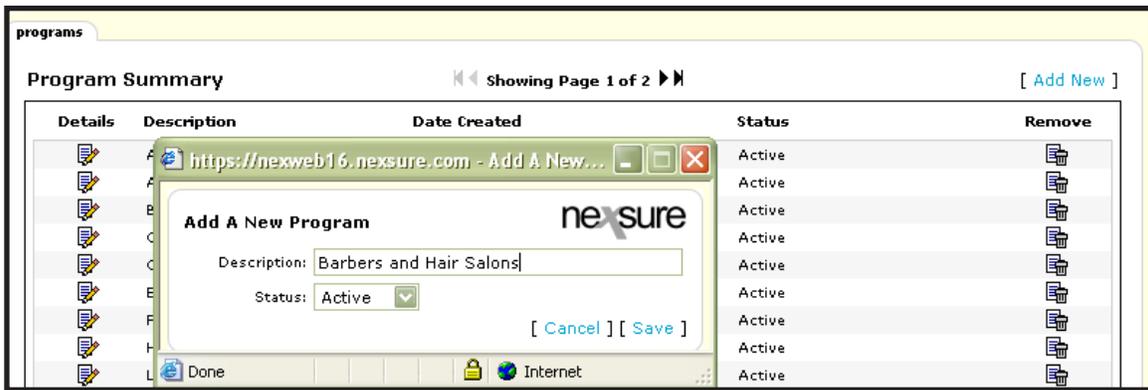
Adding Programs

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.

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.

Details	Description	Date Created	Status	Remove
	Auto Parts	02/18/2004	Active	
	Auto Parts Program	02/17/2004	Active	
	Bee Keepers	10/06/2003	Active	
	Car Dealer	11/04/2003	Active	
	Contractors	09/15/2003	Active	
	Engineers	03/03/2004	Active	
	Funeral Home	03/16/2004	Active	
	Home Builders	11/04/2003	Active	
	Lumber Suppliers	11/04/2003	Active	
	Oil Pipeline Risks	03/26/2004	Active	
	Recycling	04/27/2004	Active	
	Restaurants	02/18/2004	Active	
	Retail Sales	11/14/2003	Active	
	RV Programs	05/05/2004	Active	
	Trucking	11/04/2003	Active	

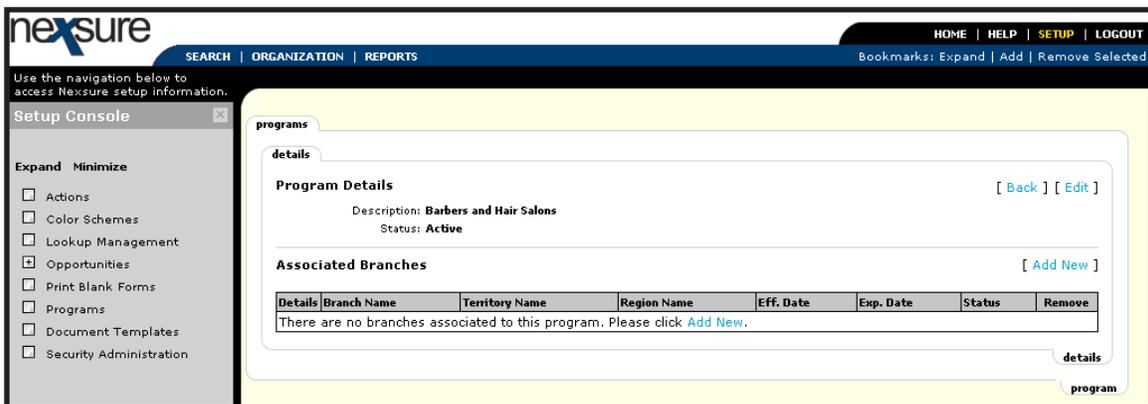
Enter the description of the Program or Program name and leave the Status as Active. Click the Save link on the bottom right to add the new program or the Cancel link to abort.



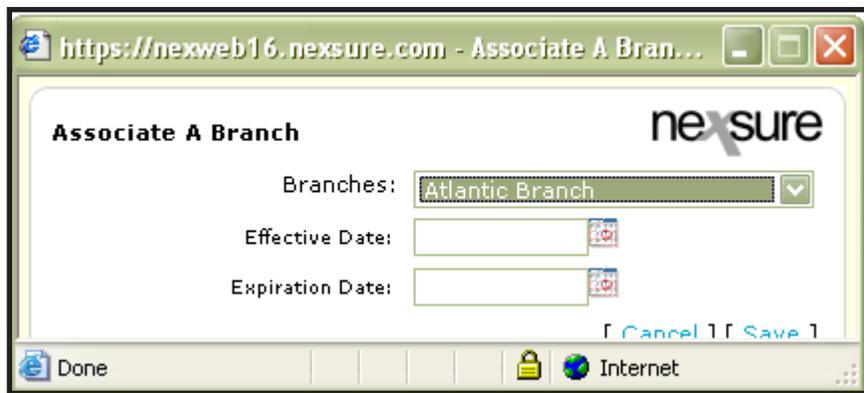
Click the **Details** icon for the newly added Program to associate with the Branches.

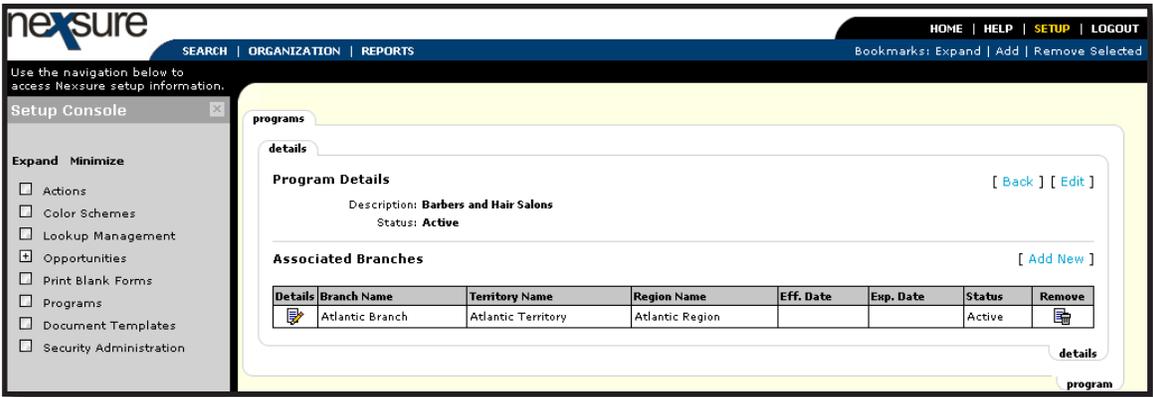


Click the Add New link on the right side of the Associated Branches screen to choose a Branch to associate with the new program.

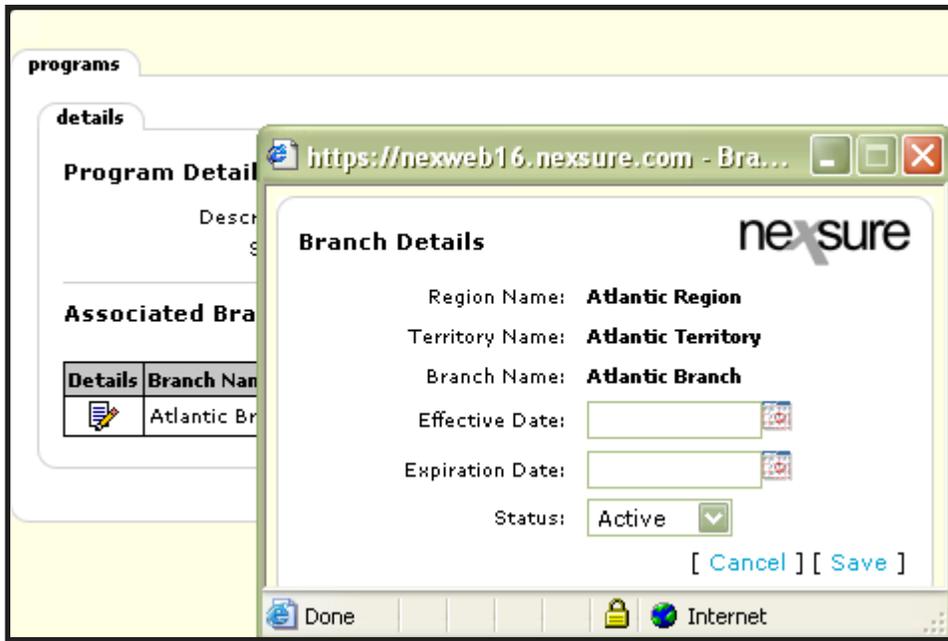


The Effective and Expiration dates are to be used to identify the Program time frame.





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



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

Branch Details

Region Name: **Atlantic Region**

Territory Name: **Atlantic Territory**

Branch Name: **Atlantic Branch**

Effective Date:

Expiration Date:

Status:

Active

Inactive

[Cancel](#)] [[Save](#)]

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

programs

details

Program Details [Back] [Edit]

Description: **Barbers and Hair Salons**

Status: **Active**

Associated Branches [Add New]

Details	Branch Name	Territory Name	Region Name	Eff. Date	Exp. Date	Status	Remove
	Atlantic Branch	Atlantic Territory	Atlantic Region			Inactive	
	McClellan Branch	McClellan Territory	McClellan Region			Active	

details

program

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.

The screenshot shows the Nexsure Setup Console interface. On the left is a 'Setup Console' sidebar with a tree view containing items like 'Actions', 'Color Schemes', 'Lookup Management', 'Opportunities', 'Branches', 'Buying Modes', 'Contact Roles', 'Details', 'Grades', 'Labels', 'Print Blank Forms', 'Programs', 'Document Templates', and 'Security Administration'. The 'Details' item under 'Opportunities' is selected. The main content area shows a table with the following data:

Details	Question	Answers	Description	Value	Status	Date Created	Remove
	Potential Profitability			30	Active	11/12/2002	
		less than \$1000	-		Active	11/12/2002	
		\$1000 - \$2499	-		Active	11/12/2002	
		\$2500 - 4999	-		Active	11/12/2002	
		\$5000 or more	-		Active	11/12/2002	
	Currently Insured?	Are they currently Insured?			Active	3/22/2004	
	yes	They are Insured			Active	3/22/2004	
	Yes	They are currently insured			Active	3/22/2004	

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

The screenshot shows the 'Opportunities' tab in the Client Profile for 'Beautiful World of Flowers'. It displays various fields for qualification criteria:

- Billing Co:** Unassigned, **Mode:** New
- Policy Number:** Unassigned, **Status:** 0 - N/A
- Qualifying Information:**
 - X/BOR Date: [text field]
 - Program: [dropdown menu]
 - Buying Mode: [dropdown menu]
- Opportunity Criteria:**
 - Potential Profitability: 12 - less than \$1000
 - Proximity: 20 - less than 5 miles from agency office
 - Presentation to Personnel: 25 - Direct Presentation to decision maker
 - Pressure on Prospect: 25 - Definitely will adopt new product/provider
 - DUI?: 0 - Yes
- Opportunity Status:**
 - Total: N/A
 - System Grade: Lump of Coal
 - User Grade: Lump of Coal
 - Commission: [text field]
- Contact:** [Add New] button

At the bottom, there is a table with columns: Details, Contact, Role, and Delete. A note below the table says: "Please click '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:

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

Question 2:		Max. Value Assigned
Proximity		20
Answer:		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

Question 3:		Max. Value Assigned
Presentation 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

Question 4:		Max. Value Assigned
Pressure on Prospect		25
Answer:		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.

Use the navigation below to access Nexsure setup information.

Setup Console

Expand Minimize

- Actions
- Color Schemes
- Lookup Management
- Opportunities
 - Branches
 - Buying Modes
 - Contact Roles
 - Details
 - Grades
 - Labels
 - Print Blank Forms
 - Programs
 - Document Templates
 - Security Administration

SEARCH | ORGANIZATION | REPORTS

HOME | HELP | SETUP | LOGOUT

Bookmarks: Expand | Add | Remove Selected

Showing Page 1 of 2

Search Filter: [Show] [Add New]

Details	Question	Value	Status	Description	Date Created	Remove
	Potential Profitability	30	Active	-	11/12/2002	
	Proximity	20	Active	-	11/12/2002	
	Presentation to Personnel	25	Active	-	11/12/2002	
	Pressure on Prospect	25	Active	-	11/12/2002	
	Shops regularly	30	Active	-	11/4/2003	
	What drives buying decision?	20	Inactive	-	1/14/2004	
	Acc to decision maker or gatekeeper	20	Active	-	1/14/2004	
	Have commitment if expectations met	20	Active	-	1/14/2004	
	Expertise in this type of risk	20	Active	-	1/14/2004	
	Intro to account	20	Active	-	1/14/2004	

answers 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 Question.

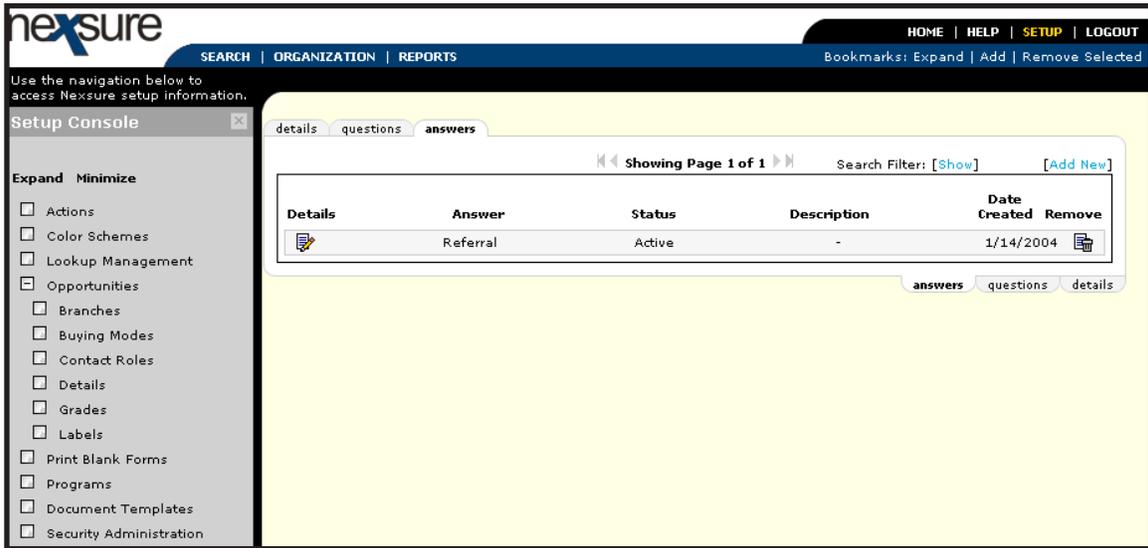
Question:

Status:

Max Value:

Description:

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

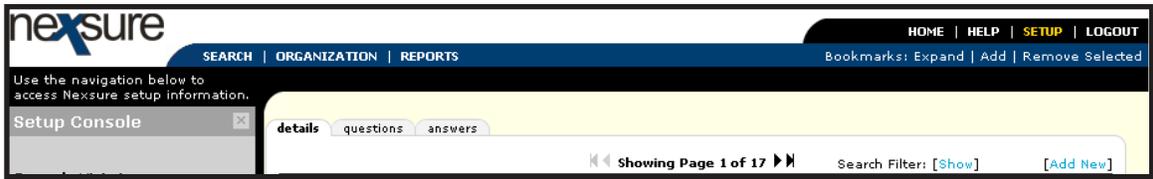


Click the **[Add New]** link located on the upper right of the screen to bring up the New Answer pop-up window. Here you should enter the Answer, make sure the status is Active and any description that will remind you later what the Answer means. Click the **Save** button on the bottom right to store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

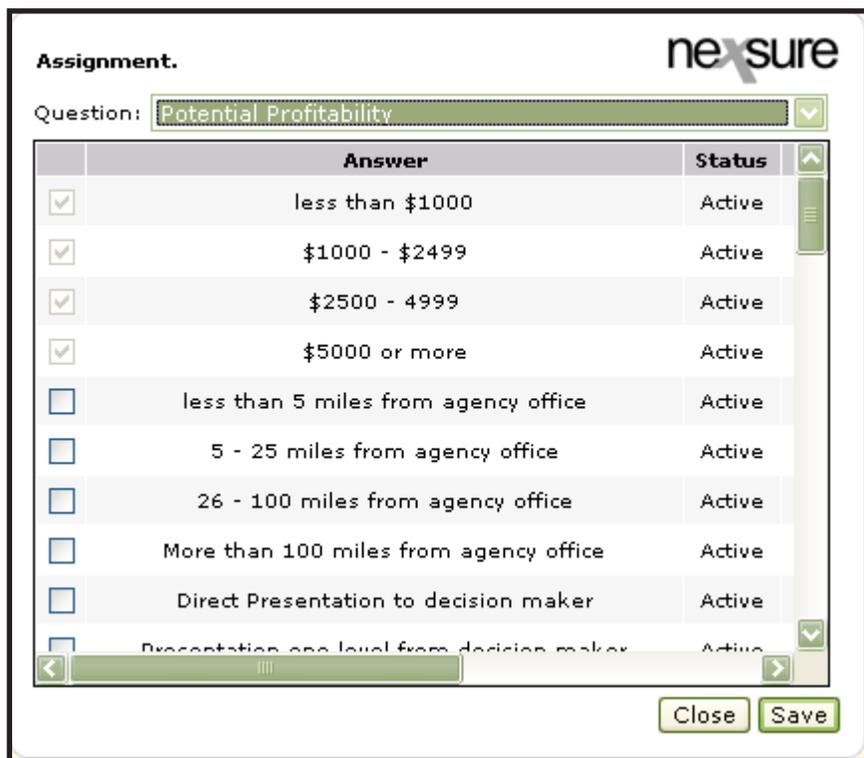


After adding all the Questions and Answers, the next step is to match the answers to the questions by doing the following:

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



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.



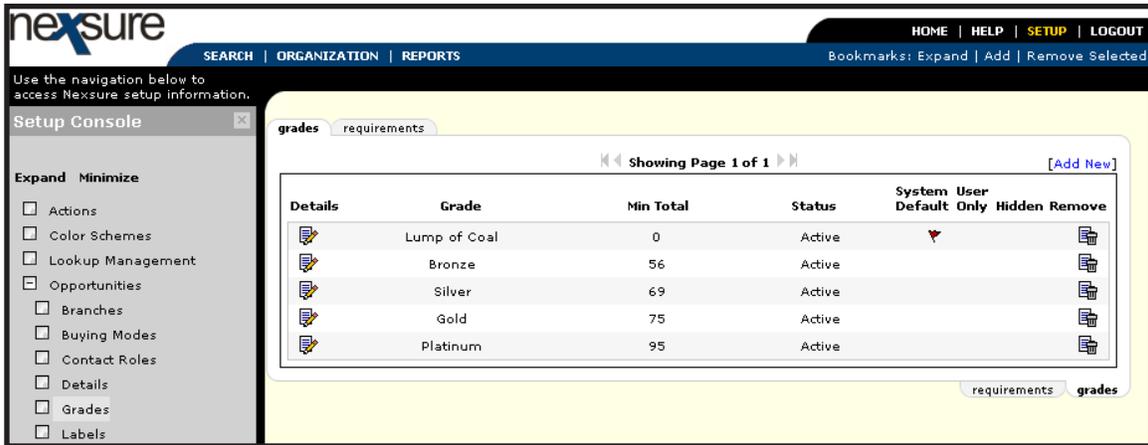
Determining and Adding Grades

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.

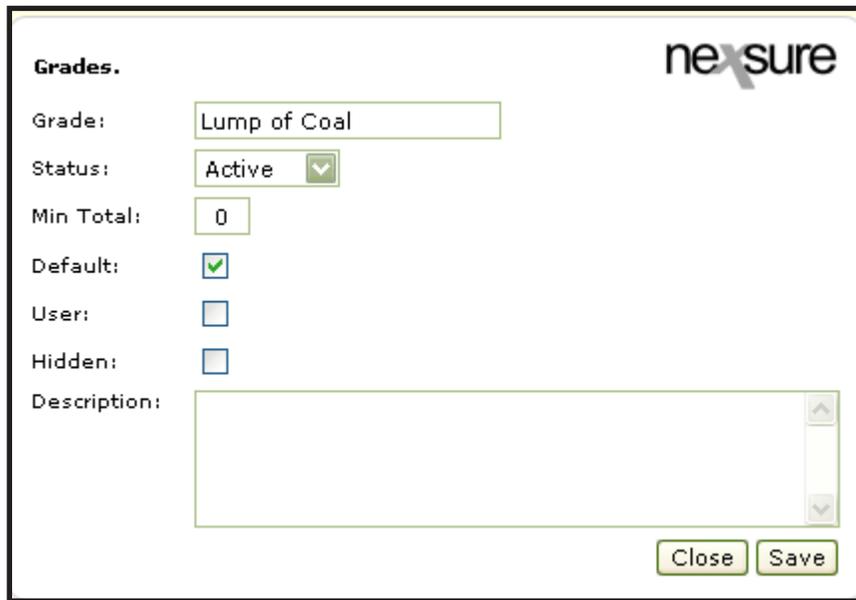
The following System Grades are the defaults added when the Organization is built.

Grade	Min. Total	Status	System Default	User Only	Hidden
Lump of Coal	0	Active	X		
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.



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.



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.

The screenshot shows the Nexsure administration interface. On the left is a 'Setup Console' with a list of expandable sections: Actions, Color Schemes, Lookup Management, Opportunities, Branches, Buying Modes, Contact Roles, Details, Grades, and Labels. The main content area is titled 'grades requirements' and shows a table with the following data:

Details	Grade	Description	Date Created	Remove
	Platinum	Presentation to Personnel >= 10	11/12/2002	

Navigation elements include 'Showing Page 1 of 1' and an '[Add New]' link. The breadcrumb trail at the bottom right shows 'requirements' and 'grades'.

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.

The 'Grade Requirements' dialog box contains the following fields and controls:

- Grade:** A dropdown menu.
- Question:** A dropdown menu.
- Value:** A dropdown menu set to '==' and a text input field.
- Operator:** A dropdown menu set to 'AND'.
- Summary:** A large text area for notes.
- Buttons:** 'Close', 'Add', and 'Save' buttons at the bottom right.

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 Requirements. nexsure

Grade:

Question:

Value:

Operator:

Summary:

Operator	Requirements	Date Created
	Presentation to Personnel > 20	10/25/2005

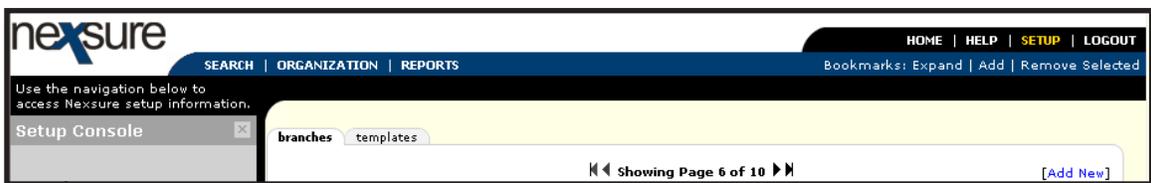
Adding Opportunities Questions and Answers to the Branches

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.



Branch Template. nexsure

Branch:

Question:

Answer:

Max: **20**

Value: Required:

Summary:

Answer	Value	Description
No record(s) found.		

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

Branch Template. nexsure

Branch:

Question:

Answer:

Max: **20**

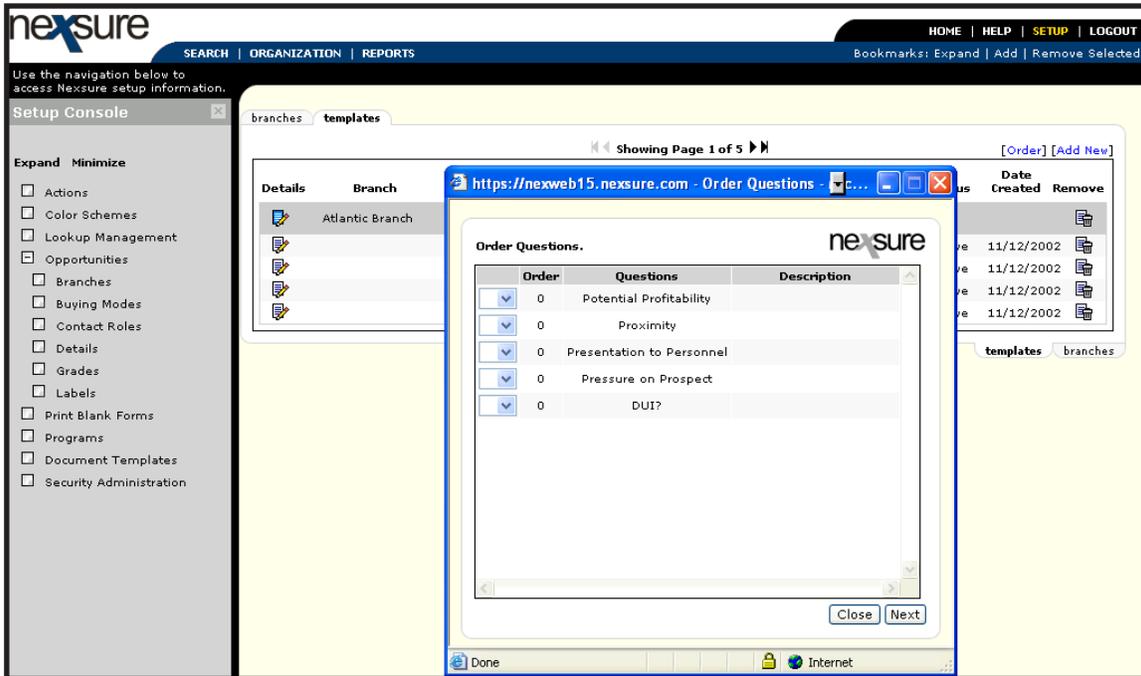
Value: Required:

Summary:

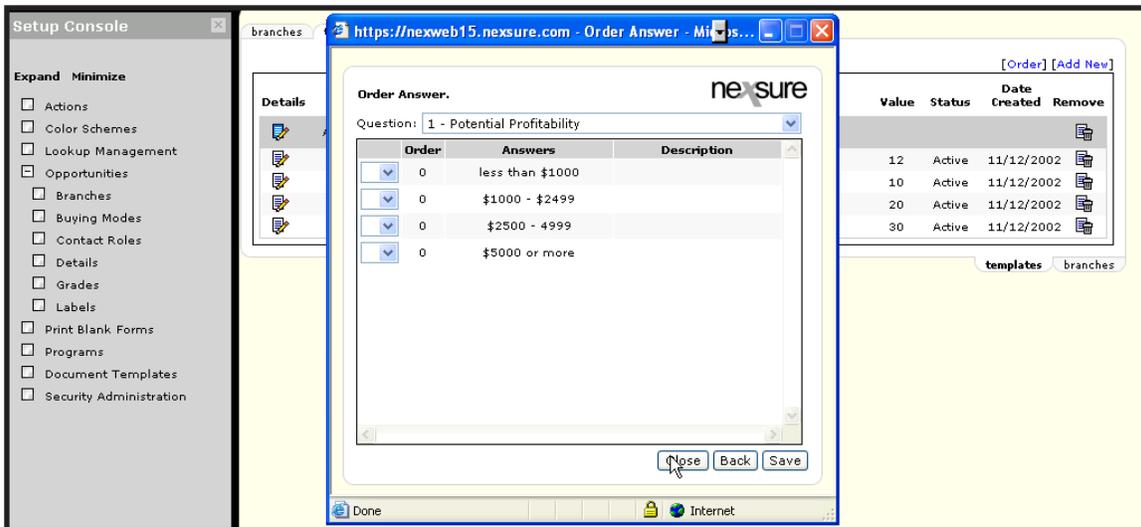
Answer	Value	Description
<input type="checkbox"/> More than 100 miles from agency office	0	

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.



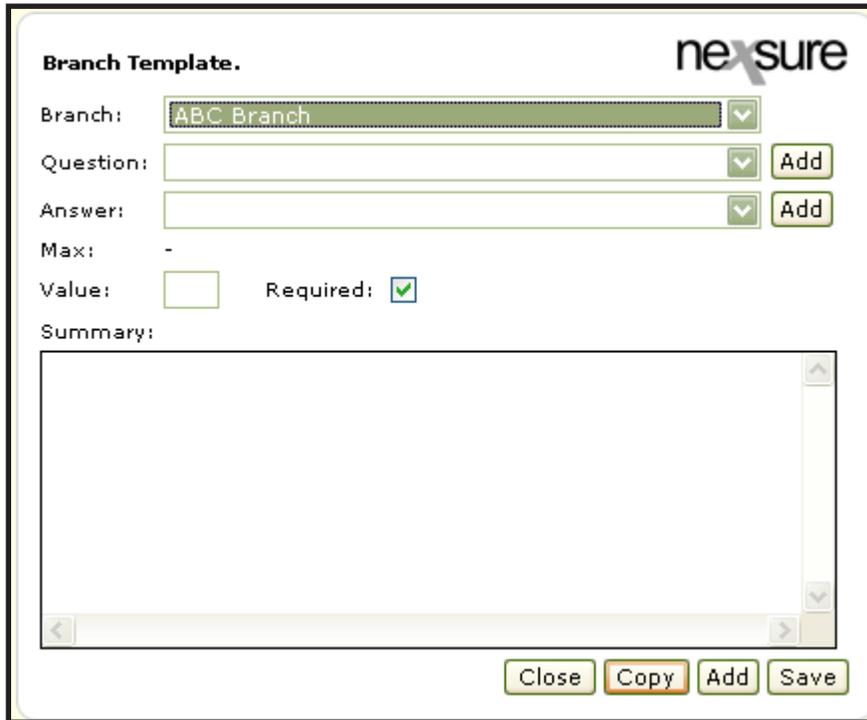
Click the **Next** button at the bottom of the screen to store and continue to the next step, which is re-ordering the question answers. Use the **Question** drop-down box at the top to choose a question and then use the drop-down boxes to select the new numbers for the answers. Click the **Save** button 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.



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:

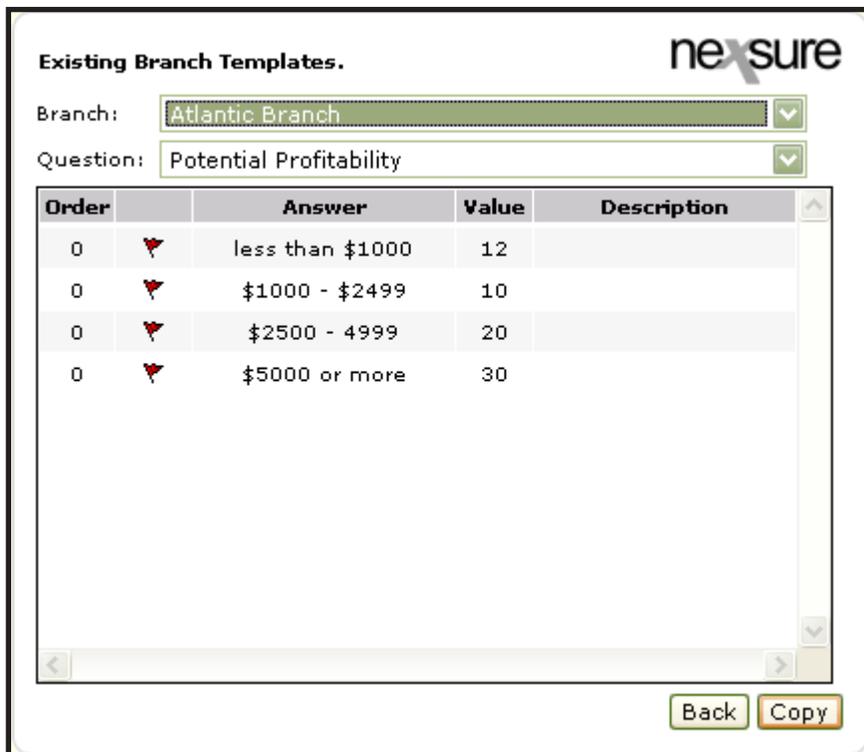
Access the **branches** tab as in the steps above and click the Add New link located on the upper right side of the screen. Choose the branch that needs to be setup, click the **Copy** button at the bottom of the pop-up window screen.



The screenshot shows a 'Branch Template' pop-up window with the Nexsure logo in the top right corner. The window contains the following fields and controls:

- Branch:** A dropdown menu with 'ABC Branch' selected.
- Question:** A text input field with a dropdown arrow and an 'Add' button.
- Answer:** A text input field with a dropdown arrow and an 'Add' button.
- Max:** A text input field containing a hyphen (-).
- Value:** An unchecked checkbox.
- Required:** A checked checkbox.
- Summary:** A large text area with a scrollbar.
- Buttons:** 'Close', 'Copy', 'Add', and 'Save' buttons are located at the bottom right of the window.

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. nexsure

Branch: Atlantic Branch

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	

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