Fast-Class File

SmartOffice

Volume 31: LTC Prospecting

Recent research has shown that individuals between 40 and 55 years old have a heightened awareness of the need for good retirement planning – including the importance of having LTC coverage. One reason for this heightened awareness is attributed to the fact that individuals between 40 and 55 years old have parents about to retire or are already retired and in some cases, must care for their retired parents. This heightened awareness can make individuals between 40 and 55 years old ideal prospects for LTC products.

This Fast Class demonstrates one way of creating a Dynamic Report that will find individuals in the ideal target age range, as well as other criteria, that would make contacts ideal prospects for LTC products.

To create a filter to find all contacts between the ages of 40 and 55 -

- Select Office Setup from the main menu.
- Select **Filters**.
- Click the Add button in the Search Filters screen.

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Search Filters	
Filter Name Category Created By	All
Search © 2000-2004 E-Z Dat.	Add Close

Figure 1: The Add button in the Search Filters screen.

- Select Contact Individual in the Category screen.
- Click the Add button in the Filter Items section of the New Filter screen.
- Select **Personal** in the **Tables Available** section of the **Filter Records** screen.
- Select Age in the Columns Available section of the Filter Records screen.
- Select In Range in the Operator drop-down field.
- Enter 40 in the From field of the Value section of the Filter Records screen.
- Enter 55 in the **To** field of the **Value** section of the **Filter Records** screen.



Filter Records						
Tables Available	Columns Available		Table		Personal	
Contact	# of Child	~			, or oon a	
Personal	Age		Column	۱	Age	
Preferred Address Preferred Phone Contact Benefit	Birth Place Citizenship DOB		Operat	or	In Range	~
Advisor Basic Info Contact Referral	Driver's License # Expiration Date		Value			
Custom Table	Gender		From	40		
	HIPAA Date		То	55		_
	Job Title	=		00		
	Marital Nationality Net Worth Occupation PIC PICQ Primary Language Salary State Tax Tobacco		Help Selec Availa Colun opera selec	t a ta able) nns a tor a ted o	ble (from Tables and a column (from Available). Specify the and value for the column.	
<	>		OK		Cancel	

Figure 2: The Filter Records screen (criteria entered for contacts age 40 – 55 filter).

- Click OK.
- Give the new filter a name in the Filter Name field of the New Filter screen.
- Add description information as needed.



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Filter Name	Filter Items	+	Û	(1) ք		
Filter Name Age 40 - 55	Age from "40" to "55"					
ABC						
OK 9 © 2000-2004 E-Z Data, Inc. All rights rese	Show SQL Cancel					

Figure 3: The New Filter screen (filter criteria, name and description added).

• Click **OK** to create the new filter.

To create a filter to find all contacts with life insurance but no LTC coverage -

- Select **Office Setup** from the main menu.
- Select Filters.
- Click the Add button in the Search Filters screen. (If the Filter Summary screen is in view, click the Add button in the toolbar.)
- Select Contact Individual in the Category screen.
- Click the Add button in the Filter Items section of the New Filter screen.
- Select **Contact Benefit** in the **Tables Available** section of the **Filter Records** screen.
- Select Life Prem in the Columns Available section of the Filter Records screen.
- Select Greater than in the Operator drop-down field.
- Enter 0 in the Value section of the Filter Records screen.



Tables Available Contact Personal Preferred Address Preferred Phone Contact Benefit Advisor Basic Info Contact Referral Custom Table	Columns Available		Table Column Operator Value 0 Help Select a ta Available) Columns operator selected	Contact Benefit Life Prem Greater Than
<	MISC Value Med Ben	~	ок	Cancel

Figure 4: The Filter Records screen (criteria for contacts with Life Policies entered).

- Click OK. The entered filter criteria will appear in the Filter Items section of the New Filters screen.
- Click the Add button in the Filter Items section of the New Filter screen.
- Select **Contact Benefit** in the **Tables Available** section of the **Filter Records** screen.
- Select LTC Prem in the Columns Available section of the Filter Records screen.
- Select Less than in the Operator drop-down field.
- Enter 1 in the Value section of the Filter Records screen.



Filter Records		
Tables Available	Columns Available	Table Contact Benefit
Contact Personal Preferred Address Preferred Phone Contact Benefit Advisor Basic Info Contact Referral Custom Table	CTD Value Crit Illness Ben Crit Illness Prem DI Ben DI Prem DPP Cost DPP Value FA Cost FA Value Homeowner's Prem Inv Cost Inv Value LTC Prem Life Ben Life CSV Life Prem MF Cost MF Value MISC Cost MISC Value Med Ben	Column LTC Prem Operator Less Than Value 1 Help Select a table (from Tables Available) and a column (from Columns Available). Specify the operator and value for the selected column.
<	>	OK Cancel

Figure 5: The Filter Records screen (criteria for contacts with no LTC entered).

- Click **OK**.
- Give the new filter a name in the Filter Name field of the New Filter screen.



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New Filter							
Filter Name	Filter Items 🕂 📋 [🗐 🗲						
Filter Name Life No LTC	Life Prem Greater Than "0" and LTC Prem Less Than "1"						
Contact with life insurance but no LTC							
OK S © 2000-2004 E-Z Data, Inc. All rights rese	Show SQL Cancel						

Figure 6: The New Filter screen (criteria for contacts with Life no LTC added).

- Add description information as needed.
- Click **OK** to create the new filter.

To create a filter to find all contacts with an income \$50,000 or greater -

- Select Office Setup from the main menu.
- Select Filters.
- Click the Add button in the Search Filters screen. (If the Filter Summary screen is in view, click the Add button in the toolbar.)
- Select Contact Individual in the Category screen.
- Click the Add button in the Filter Items section of the New Filter screen.
- Select Personal in the Tables Available section of the Filter Records screen.
- Select **Total Income** in the **Columns Available** section of the **Filter Records** screen.
- Select Greater than or Equal to in the Operator drop-down field.
- Enter 50000 in the Value section of the Filter Records screen.



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Tables Available Contact Personal Preferred Address Preferred Phone Contact Benefit Advisor Basic Info Contact Referral Custom Table	Columns Available	TablePersonalColumnTotal IncomeOperatorGreater Than or Equal ♥Value▼50000FelpSelect a table (from Tables Available) and a column (from Columns Available). Specify the operator and value for the selected column.
<	>	OK Cancel
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Figure 7: The Filter Records screen (criteria for contacts with income > \$50,000 entered).

- Click **OK**.
- Give the new filter a name in the Filter Name field of the New Filter screen.



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New Filter						
Filter Name	Filter Items	+ 🗊 🕼 🎾				
Filter Name Income > 50k	Total Income Greater Than "50000"	or Equal to				
Description ABC Contact Total Income greater than \$50,000						
OK S © 2000-2004 E-Z Data, Inc. All rights rese	Show SQL Cancel					

Figure 8: The New Filter screen (criteria for contacts with income > \$50,000 added).

- Add description information as needed.
- Click **OK** to create the new filter.

Note: The criteria for contacts between the ages of 40 and 55 and contacts with an income of \$50,000 or greater can be added to the same filter. In this example, the sets of filter criteria have been separated for greater flexibility in future data mining.

To create a Dynamic Report that will find all contacts meeting the criteria for ideal LTC prospects (between 40 - 55, income \$50,000 or greater, and life insurance holders with no LTC coverage) –

- Select Reporting/Marketing from the main menu.
- Select Dynamic Reports.
- Click the Add button in the Search Dynamic Reports screen.
- Select Contact Individual in the Category screen.
- Click **OK**.
- In the **Dynamic Report** screen, select columns as needed on the **Column Description** tab.
- Select the Name/Description tab to add filters.
- Click the Add button in the Selected Filter List section.
- Enter search criteria in the Filter Name field of the Search Filters screen for one of the appropriate filters (Life no LTC, Income > 50K, Age 40 – 55).
- Select the filter by clicking the hypertext link of the selected filter in the first column of the **Filter Summary** screen.
- The filter will be added to the Selected Filter List section of the Name/Description tab.
- Repeat the process until each filter (Life no LTC, Income > 50K, Age 40 55) is added to the Selected Filter List section.



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Dynamic Report	· · · · · · · · · · · · · · · · · · ·					
Column Description Name/Description Report Packs	age					
Dynamic Report Name/Description	The Filter(s) Associated With This Report					
Report Name LTC Prospects Report Class	Add one or more filter(s) to the following spreadsheet to be associated with this report.					
Keywords Cross Marketing; Sales	Selected Filter List 🗕 🕇 📋					
Excel Templates	Age 40 - 55					
Set Name	and Income > 50k					
Description ABC	and Life No LTC					
Contacts w/Life - no LTC; Income > 50k; 40 - 55						
	<]					
	Click here to change the filter parameters at run time.					
OK Cancel						
<						

Figure 9: Filters added to the Name/Description tab in the Dynamic Report screen.

- To add packaged items Form Letters, Follow-up phone calls, Campaign Assignment, select the **Report Package** tab.
- Give the **Dynamic Report** a name in the Report Name field of the **Name/Description** tab.
- Add Keyword and Description information as needed.
- Click **OK** to create the new Dynamic Report.

To run the Dynamic Report for LTC Prospects -

If the Dynamic Report Summary screen is open:

 Select the LTC Prospect report by tagging the record and then click the **Run** button in the toolbar – or – click the hypertext link for the LTC Prospect dynamic report in the first column of the **Dynamic Report Summary** screen.

If the **Dynamic Report Summary** screen is not open:

- Select **Reporting/Marketing** from the main menu.
- Select Dynamic Reports.
- Enter search criteria for the LTC Dynamic report in the **Search Dynamic Reports** screen.
- Click the **Search** button.
- Select the LTC Prospect report by tagging the record and then click the **Run** button in the toolbar – or – click the hypertext link for the LTC Prospect dynamic report in the first column of the **Dynamic Report Summary** screen.



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Enter Contact Name	Contact Name ↔	Туре	Source	Occupation	DOB	Review Date	Total Premium	
GO	Ackerman, Joseph M.	Client	Referral	Medical	02/27/1953	08/27/2005	5,104 📐	
Calendar 🔼	Ackerman, Kathleen M.	Client	Referral	Architect	01/03/1955	03/14/2005	6,101	
Contact	Anderson, Mike	Client	Referral	Media	01/04/1959	01/15/2005	5,450	
Household	Ansong, David M.	Client	Referral	Medical	07/20/1953	02/15/2005	24,597 🔳	
Reporting/Marketing	Ansong, Judy A.	Client	Referral	Manufacturing	01/03/1955	01/15/2005	2,000	
Opportunity	Arrieta, Michael J.	Client	Referral	Accountant	10/20/1954	12/31/2004	25,524	
Pending Case	Bartelo, Frank J.	Client	Referral	Software	11/15/1948	08/15/2004	4,140	
Policy	🔲 Buy, William	Client	Personal	Law	07/30/1961	10/10/2004	25,505	
Policy/PCM Setup	Chung, Harold	Client	Referral	Automotive	02/07/1958	03/31/2005	2,600	
Investment	Ericson, Nancy	Client	S. Thompson	Teacher	09/30/1950	04/20/2004	3,000	
Asset Allocation	Farmer, Eileen	Client	S. Bicosta	Utility	09/20/1959	06/30/2004	2,160	
Synchronization	Ei Frances	Client	M.Shaw	Finance	09/30/1948	05/15/2004	2 750 🚩	
Job Queue	Records Shown: 20 Tot	al Records: 2	0					
User Setup	© 2000-2004 E-2 Data, Inc.	All rights rese	rvea.					
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Figure 10: The LTC Prospects dynamic report.

