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# WEB & GLOBAL PARTNER XTRANET USER GUIDE FOR INTERMEDIARIES



# WEB & GLOBAL PARTNER XTRANET USER GUIDE FOR INTERMEDIARIES

At William Russell we treat our intermediaries as Global Partners. Assisting you with the support and selling of our international insurance plans, means that your clients receive the best advice, and we can all profit from new sales and business retention.

Please familiarise yourself with this short document in which you will find very useful information guiding you through the resource that is available to you.

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## USE THE WEB TO YOUR ADVANTAGE

Use our content-rich web site to your advantage. It offers you valuable resource and functions that will aid you in your everyday business and enable you to sell our Global plans with confidence.

Top of the value-added sales and marketing support aids that we offer our brokers is the Global Partner Xtranet which offers you the ability to create, store and manage your own quotes, and provides you with supporting materials.

## THE GLOBAL PARTNER XTRANET IN A NUTSHELL

(Covered in more detail on pages 4-6)

- Create, store and manage quotes unique to you and your individual clients.
- View the status and value of each quote to manage cash flow and close business.
- Email personalised PDF quotes to your clients.
- Add tracked links on your web site to our Quick Quote system.
- All your quotes are registered on our database as your client, so you'll never miss commission for a sale.

### **We also provide access to these great support materials:**

- Free marketing literature and help-sheets.
- News published through our regular Broker Bulletin informing you of promotions, plan changes and general news and views.
- Quick Quote buttons which can be placed on your web site with all traffic tagged to identify you as the introducing agent.
- The Global Partner Campaign library of promotional banners allowing you to email your clients with William Russell promotions or key communication messages.

## OTHER KEY AREAS OF INTEREST

There are other key areas of our web site which will provide you and your clients with information and added value.

- [Dedicated intermediary area](#) Changes to products and promotions
- [Benefits chart](#) Compare and view health plans in different currencies
- [Web Works](#) Literature PDF downloads
- [Comprehensive product detail for new individual clients](#)
- [Comprehensive product detail for new group clients](#)
- [Comprehensive information for policy-holders](#)

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## 1. ACCESSING THE GLOBAL PARTNER XTRANET

Our Global Partner Xtranet encompasses two areas – a log-in quote & admin database, and web pages providing support materials.

### Logging-in

You can use the [Quote & Admin database](#) by entering your existing username (which is the email address that you registered with) and password. If you have not already registered, see 'Registering' below.

### Forgotten passwords and changing passwords

If you have forgotten your password or would like to change it to something you'll remember, go to the log-in page and click [forgotten password](#).

Enter the requested details, and you'll receive an email detailing your forgotten password or confirming that your password has been changed.

### Registering

A broker MUST be registered to be able to use the Global Partner Xtranet. You can [register](#) on-line through the 'register' and 'join us now' links, and we will contact you with your password.

**TIP:** Companies with more than one broker wishing to use the system, can register once as a company with all brokers using the same system and able to view all William Russell quotes produced company-wide, or each broker can register individually to manage their own quotes.



## 2. CREATING AND ACCESSING QUICK QUOTES

### Creating a Quick Quote

Log-in to the [Quote & Admin database](#), click on either the “Create GlobalHealth quote” or “Create GlobalLife/Income quote” and complete the requested information.

All quotes produced are stored on your unique database, using the following information:

**Id** = Reference number used to retrieve quotes

**Name** = Name of client

**Type** = Health or Life (life & income protection) quote

**Status** = Indicative, applying or applied (see ‘Checking the status of Quick Quotes’ below)

**Premium** = Total monthly premium

**Last Updated** = The date when the quote was last accessed or changed

**Action** = Tick this box to delete quotes

### Deleting a Quick Quote

Tick the box in the “Action” column for the quotes to be deleted and then click the “Delete” button.

### Accessing and changing Quick Quotes

To view all quotes click on ‘View Quotes’ and retrieve your quote by clicking on the Name or Id. If changes are made to a retrieved quote, the new quote will over-write the original.

**TIP:** If you would like to provide your client with alternative quotes whilst keeping each alternative quote created, you will need to produce a new quote for each alternative.

### Checking the status of Quick Quotes

**Indicative** = a quote has been created

**Applying** = a client is in the process of completing the online application form

**Applied** = the application form has been completed and is being processed



### 3. PROVIDING CLIENT ACCESS TO YOUR QUICK QUOTES

#### Emailing a Quick Quote

Create or retrieve a quote as described on pages 5 and 6. Click “Email this quote” at the top of the page and enter the client’s email address. Your client will receive an email with details of how to retrieve the quote and how to apply online (Global Health only).

#### Creating a PDF Quick Quote

Create or retrieve a quote as described on pages 5 and 6. Click “Save quote as PDF”. Save the PDF to your computer then create an email for the client and attach the PDF in the normal way.

The PDF will feature your company name so that your client will never forget who supplied it.

#### Retrieving a Quick Quote

Your client can retrieve a created quote using the email address entered on the quote and the reference number.

They will then be able to amend the quote and, for Global Health only, apply online. If they apply, “Applied” will be displayed in the status in your ‘View Quotes’ column.



## 4. MARKETING OUR QUICK QUOTE SYSTEM TO YOUR CLIENTS

You can place a link to our Quick Quote system on your web site for individual clients to produce their own quotes. These links are tracked on our database so that we can identify your clients, and you'll never miss the credit for a completed sale.

Even if your client completes a quote on our web site, there is a 'Where did you hear about us' field in which they can specify your name. This is also picked up by our system so that you are recognised as the introducing agent.

NB: Group quotes can not be done in this way. Please contact your [regional broker representative](#) for a corporate quotation.

### How to add a Quick Quote link

Click "Your Quick Quote links", and copy the link from the Global Health, Global Life and/or Global Income Protection boxes.

Pass the link/s to your web developer, who can add this to your website as a hyperlink or embedded in a Quick Quote web button.

### How to access our Quick Quote buttons

You can access the [Quick Quote buttons](#) in the left hand navigation of the intermediary web section.

There are two buttons, one for the Global Health Quick Quote and the other for the Global Life & Income Protection Quick Quote. Download the button/s required, embed the unique Quick Quote link/s as described above, and add to your site in the normal way.



## 5. USING OUR SUPPORT MATERIALS

The '[Supporting our intermediaries](#)' area of our site will provide you with up-to-date information, plus the option to personalise literature, and download buttons and banners. The more you use the facilities available to you, the more business you'll drum up with us.

### Global Partner Campaign library

We have developed a library of email campaigns that you can use to email your own clients. These campaigns could be product promotions or could simply communicate key protection messages and case studies.

Each campaign is a simple attention grabbing banner that can be placed in your emails along with your own message and contact details. The banner contains embedded links to web pages on our site, and a Quick Quote link to our on-line quoting system.

We have developed a way of allowing you to add your unique link/s so that when your clients produce a Quick Quote from the email, the quotes will be tagged with your name on our database so you'll be assigned commission for any ensuing sale that comes direct to us.

Accessing the Global Partner Campaigns

*(Based on Outlook version 2007)*

1. Access the [Global Partner Campaigns](#), choose the required banner, and download it.
2. Press CTRL A to select the banner, and CTRL C to copy.
3. Go to Outlook and create a new message.
4. Paste the banner (CTRL V) into the email window.
5. Then log-on to the [Quote & Admin database](#) to retrieve your unique link.
6. Next to the create a quote links, click "Your Quick Quote links", and copy the link from the Global Health or Global Life & Income Protection boxes.
7. Go back to your message in Outlook.
8. Highlight the 'Get a Quick Quote now' text in the banner.
9. Go to Insert > Hyperlink in Outlook's menu, and paste (CTRL V) your unique Quick Quote link.
10. Click OK.

Add your own message and contact details, and you're ready to email. You will see any quotes performed by your clients appearing in the 'Referring quotes' list on your unique Quote & Admin database.

**TIP:** We suggest that you email a test to yourself before you email your whole database.

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### **Quick Quote buttons**

Provide your clients with a quick quote facility on your web site. Please follow the instructions on page 5 to access our Quick Quotes buttons and your unique Quick Quote links.

### **Help-sheets**

We publish a library of A4 help-sheets to support you in the selling of our products which you can download, print off or email to clients.

There are a variety of help-sheets from those offering pure product information, to case studies, risks of an expatriate lifestyle and top tips on selecting the right cover.

[See our help-sheets.](#)

### **Broker Bulletin, keeping you up-to-date**

Excellent communication is a must to ensure that you have up-to-date product information, relevant company and industry news.

We publish the Broker Bulletin every month, which is a concise, informative and interactive news update in the form of an email broadcast.

[See our Broker Bulletins.](#)

## **GIVE US YOUR FEEDBACK**

We aim to ensure that we develop a system that's right for you. If you have any feedback on using our Global Partner Xtranet, please contact us on [marketing@william-russell.com](mailto:marketing@william-russell.com)

## **DO YOU NEED HELP?**

We are happy to help. Please contact your [regional broker representative](#).

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