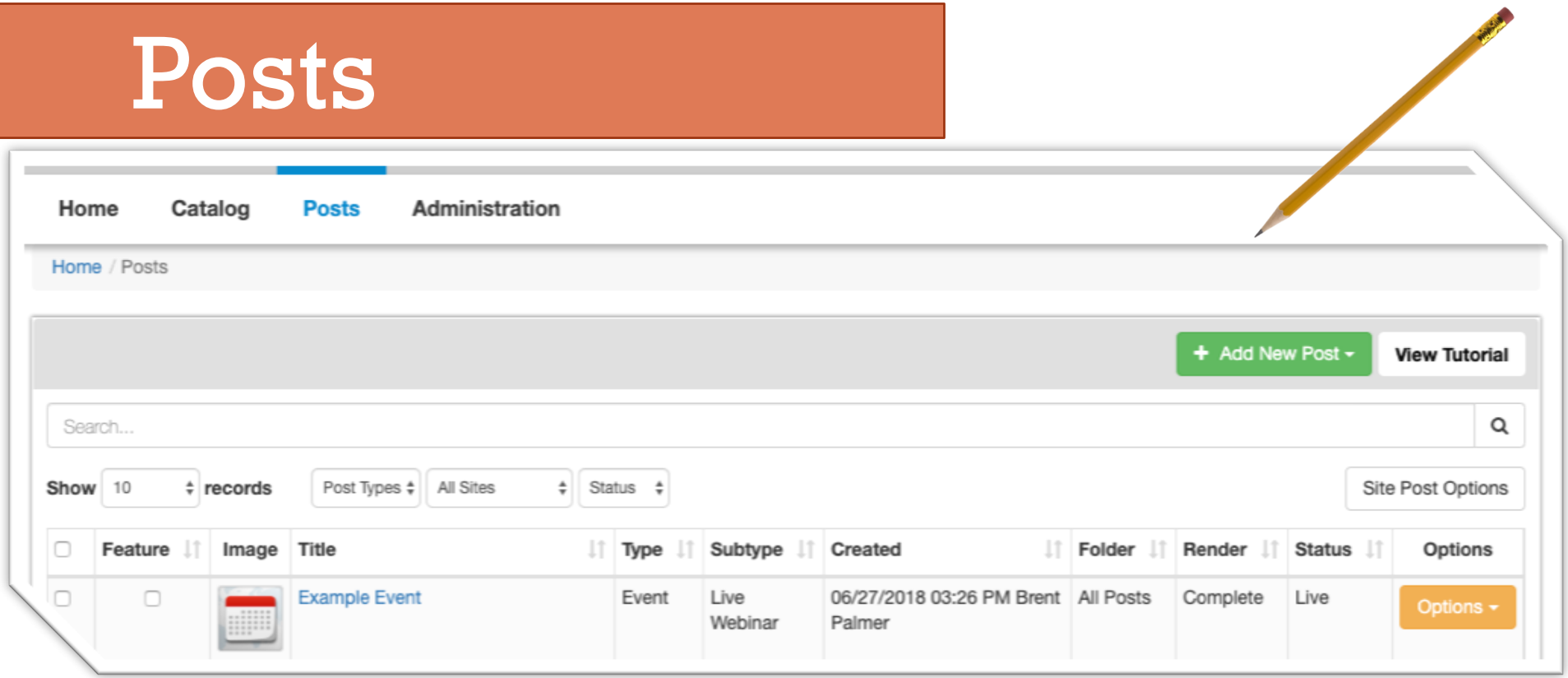
Best Practices For Catalogs

Posts • Contacts Page • Catalog Pages • Posting Newsletters • Advanced Search

Posts



3 Types of Posts

Content – An uploaded file that is viewed on the site. Convey utilizes a file viewer allowing the file to be displayed. The post can be downloaded or email shared. The post icon is a custom thumbnail or screenshot of the file. Content can also be created on the site, where the viewed information is NOT an uploaded file, but is created similar to a web page or Word document.

Event – Live Webinar, Audio Conference Call, In-person Event. Event Posts can manage registration or send interested members to an external registration page like Eventbrite. All events display on the homepage site-wide calendar.

Blog – Informal journal-style text entries designed to convey insight into your business or share your company's views.

CONTENT POST

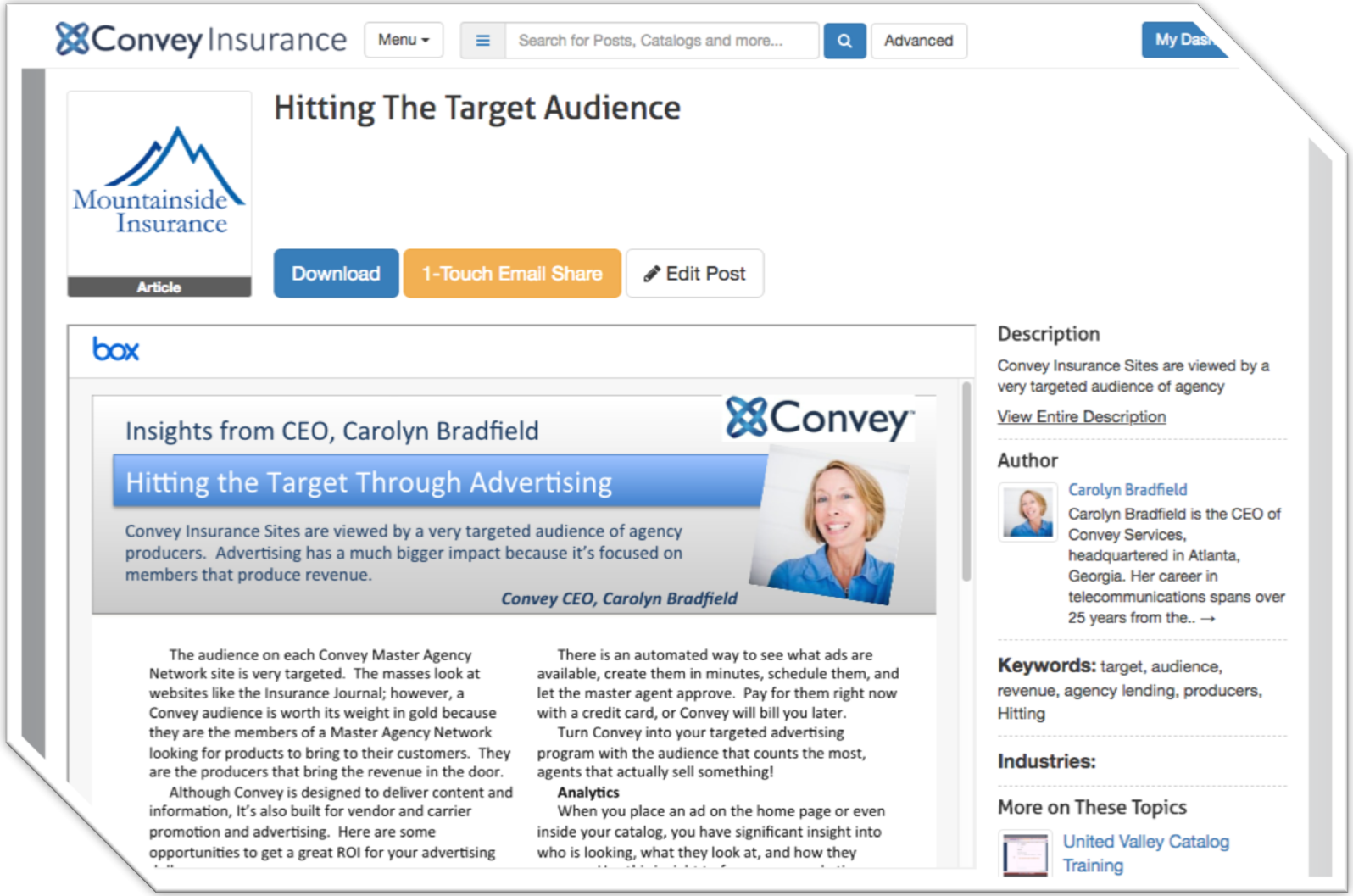
2 Options

1) Display the file using the "Box" viewer as the central piece of content. When using this option, the post description appears on the side bar.

2) Display the Description area as the central piece of post content. However, a file can be attached, and must be downloaded to be viewed. This option is great for files that are too wide for the viewer, like a large Excel file.

Supported File Types For Viewer

- **Documents:**
  - PDF, DOC/DOCX, or PPT/PPTX
- **Video:**
  - AVI, FLV, MOV, MP4, WMV
- **Audio:**
  - WAV, MP3

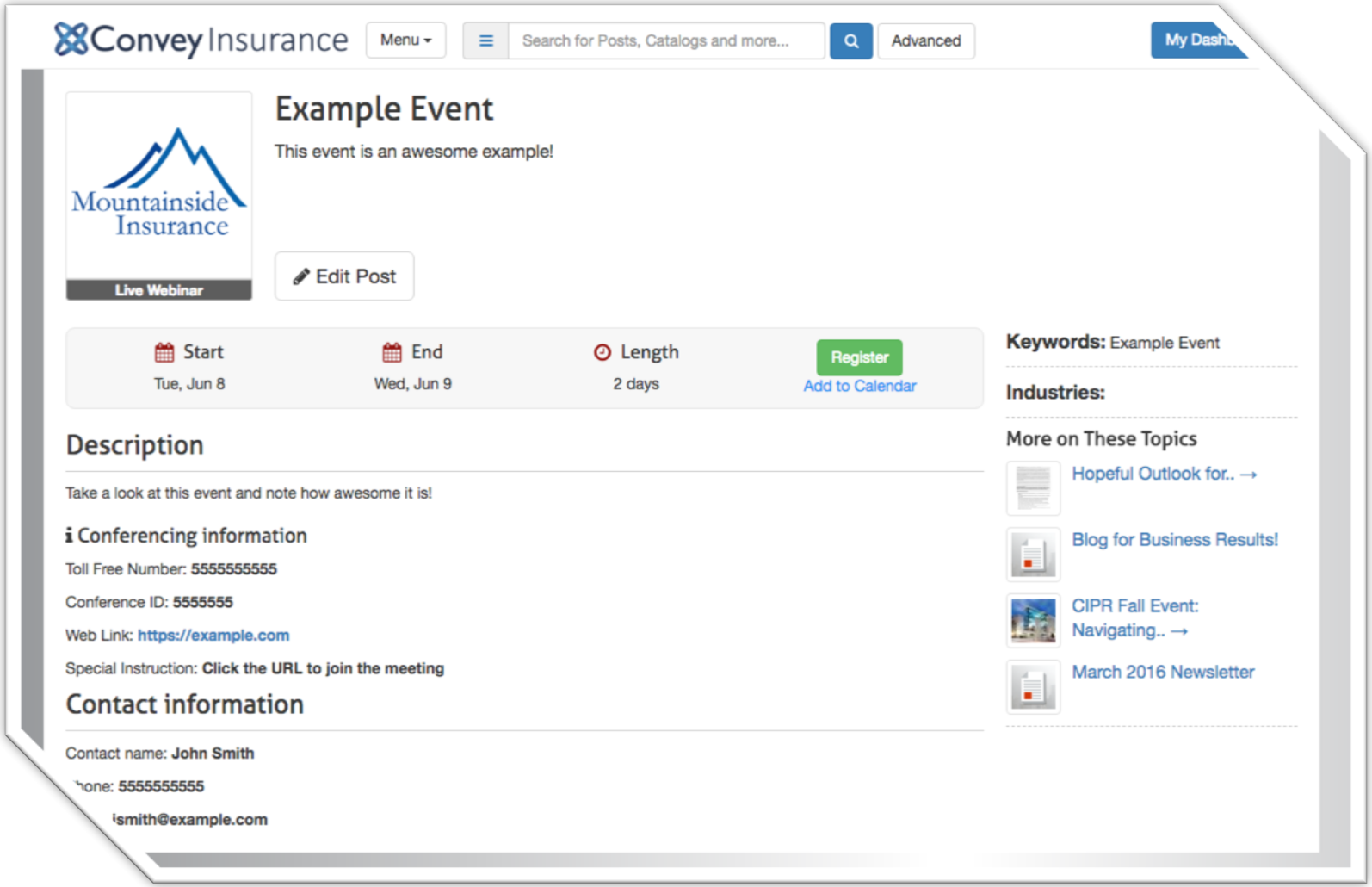


NOTE: Keep your catalog clean by schedule posts so they come down automatically

EVENT

Live webinars, audio conference calls, and in-person events. Events are added to your catalog's calendar. And on the homepage site-wide calendar.

You can have Convey manage registrations and view submissions in the reports section of the site, or you can have external registration and redirect towards any URL you would like.



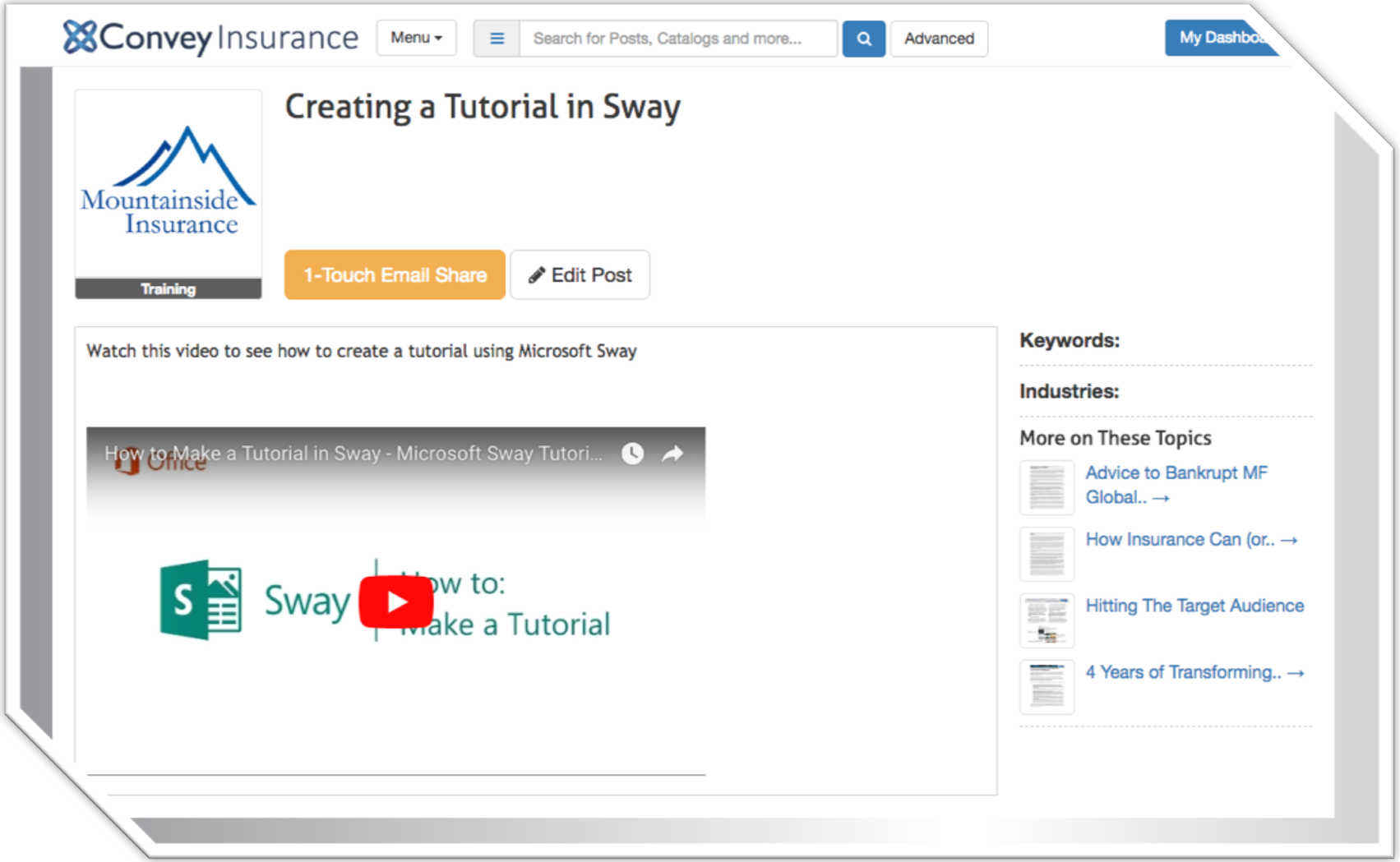
NOTE: Keep your catalog clean by schedule posts so they come down automatically

BLOG

Informal journal-style text entries designed to convey insight into your business or share your company's views.

The "Description Area" is displayed as the central piece viewed. Very similar to creating a web page.

Files can also be attached to be downloaded.



You can embed images, videos, links and more!

NOTE: Keep your catalog clean by schedule posts so they come down automatically

Posting Newsletters

Posting Newsletters – originally sent through an email marketing service

Copy and paste the email or the "view in browser" version of the email into a Word Document. Then post the Word document as a Content Post. Remember, Content Posts Display a thumbnail of the document. It's more pleasing to the eye.

If the document does not view properly on Convey, or the hyperlinks do not copy over, contact support and Convey will post it for you.

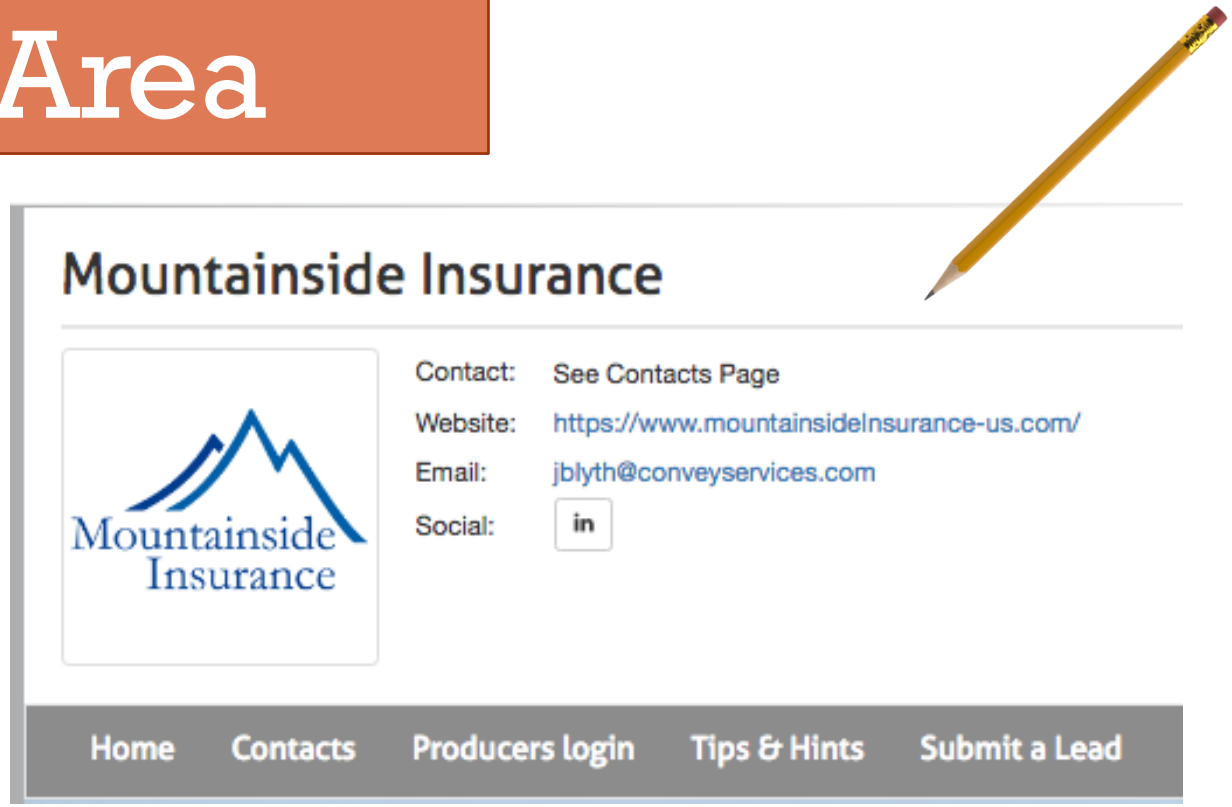
Support@conveyservices.com

Header Contact Area

Contacts in the Header Area

Most Carriers and Vendors have more than one person for agents to contact. The catalog header area, shown to the right, is meant for only one contact. Therefore, agents are directed to the Contacts Page. (See the next slide)

However, if there is truly one point of contact, then add that person to the header area.



Add to Catalogs

	Select All Spokes	Select Catalogs
☑	Combined Agents of America, LLC	☑ Hanover
☑	Iroquois Members	☑ Hanover ☑ Hanover - All Access
☑	PIIB Connect	☑ Hanover
☑	Professional Insurance Associates, Inc.	☑ Hanover
☑	SecureRisk - Insurance Solutions	☑ Hanover
☑	United Valley	☑ Hanover

There is an option to deliver a different contact per site. Use the Hub and Spoke table to deliver the right contact information to the right site.

Contacts Page

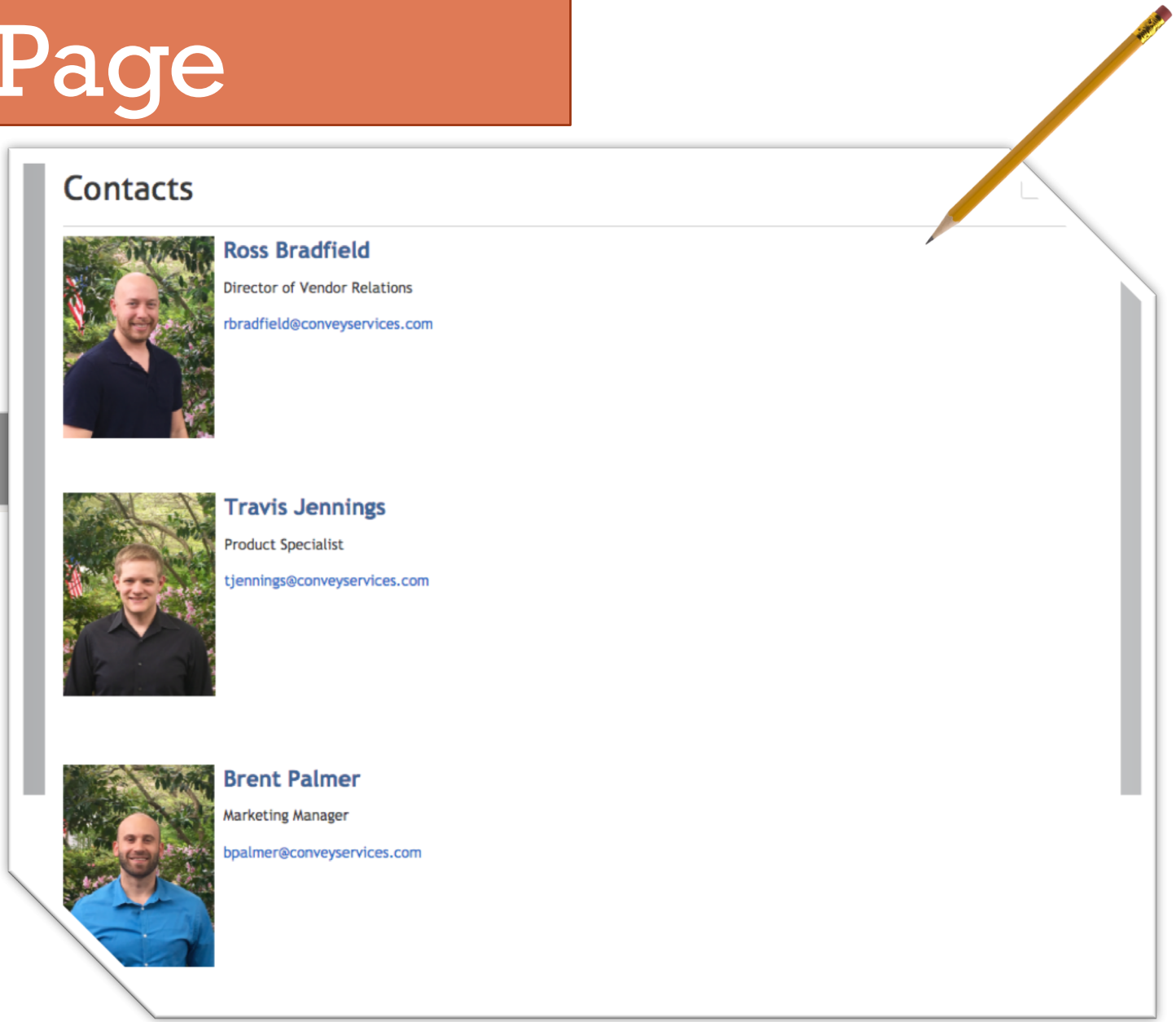
Contacts Page

Each Agency Partnership requests a contacts page to appear in the navigation bar on that catalog.

Home Producers Login Contacts

The contacts page should contain a Point of Contact for the organization including:

- Name
- Title
- Phone #
- Email Address



Catalog Pages

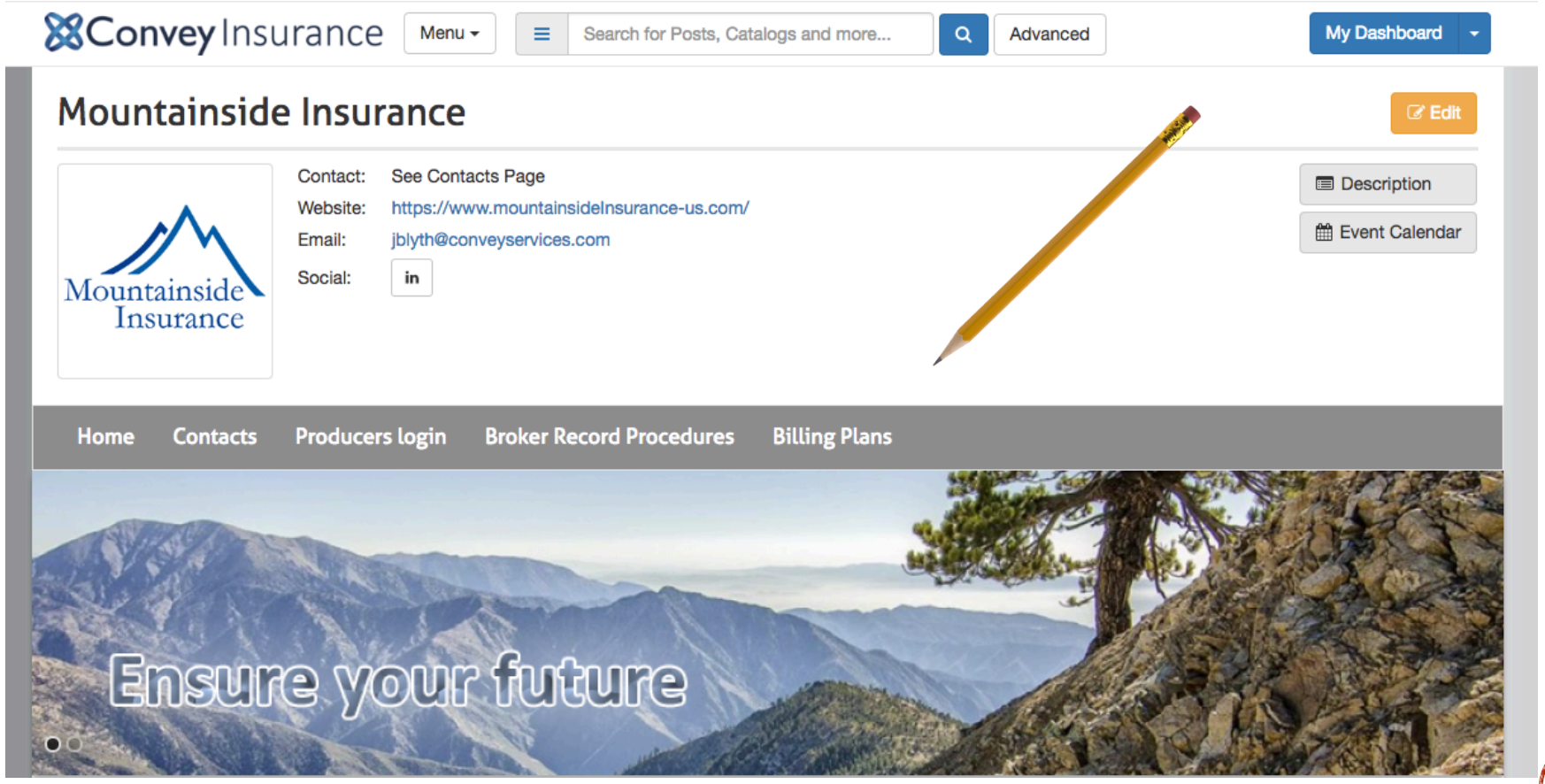
Catalog Pages

Each Agency Partnership requests certain pages to be standard in the navigation bar on each catalog.

These pages include:

- Broker Record Procedures
- Billing Plans

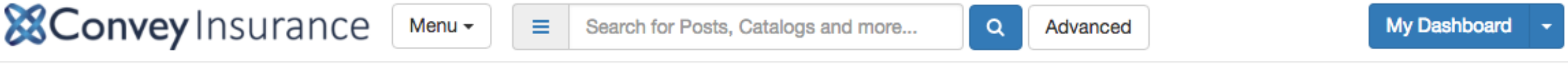
Please take the time to fill in this information.



Advanced Search

Search function on all sites

The search function is fairly complex and can be sorted through multiple criteria; however, it is important to note that the search results are displayed according to certain information from catalogs and posts.



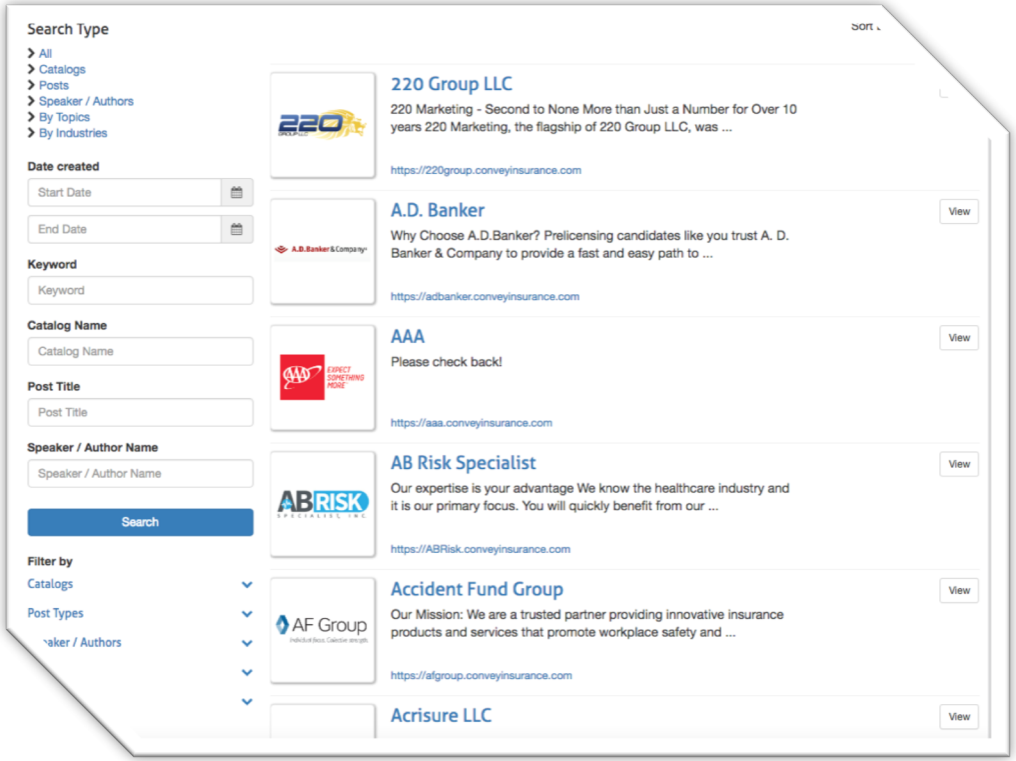
What is Searched:

Catalogs:

- Title
- Description
- Topics

Posts:

- Post Title
- Subtitle
- Description
- Post Type



What should you add?

All Convey Insurance site owners want you to keep your catalog updated. The best way to get free advertising from them on the homepage is to add something new every other week. The site has an automated process to bring new things to the front of the site.

Your catalog does not need to reflect your company's complete offering. Add the things that are most important to the audience. Or, add the "cliff note version" of your company, and provide hyperlinks for agents to do a deeper dive to your own company portal.

Make sure a viewer can quickly tell these 4 things about your company.

- Who are you and what do you sell?
- What is your Ideal Customer Profile?
- How do agents contact you? Fill out a Contacts page For each portal you are connected to.
- Why should they work with you over the next guy?

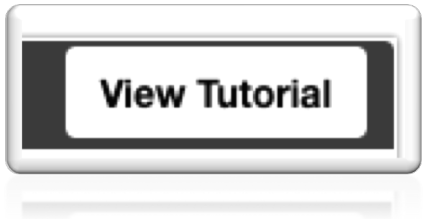
Add things like

- Appetite Guides
- Success Lists/Hit Lists
- Marketing Material
- Promotions or Incentives
- Forms
- Anything to help agents work smarter.

How do I do this?

View the Tutorial

Operational tutorials are located in your dashboard.



Catalog Tutorial
After logging in click My Dashboard
Click Catalog Tile
Click View Tutorial Button

Pages Tutorial
After logging in click My Dashboard
Click Catalog Tile
Click the Pages Tile
Click View Tutorial Button

Post Tutorial
After logging in click My Dashboard
Click Post Tile
Click View Tutorial Button

I Need HELP!!!

Need help or training?
Contact Convey
support@conveyservices.com

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