



QUICK START GUIDE

EchoQuote™

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## Introduction

Welcome to EchoQuote™. This Quick Start document describes the steps needed to make your implementation of EchoQuote™ smooth and non-intrusive. EchoQuote™ has been designed to work within your existing sales and marketing framework with minimal “care and feeding” on your part. We appreciate your interest in using EchoQuote™ to drive new business for your company.

## Goals

The overall goals of using the EchoQuote™ service are:

1. Capture a higher number of better quality leads using the promise of Self-Service Pricing.
2. Improve your Customer’s experience with your website.
3. Capture leads earlier in the sales cycle when the project requirements can be influenced most.
4. Empower the sales force to act on leads faster.
5. Show measurable marketing results for dollars spent.

## Summary of Steps

### ***Initial Mutual Non-Disclosure (assumed with online Trial activation, if applicable)***

EchoQuote™ will be providing an integral service for your organization and requires access to certain confidential information, mainly Commercial Pricing and Channel strategy. To ensure confidentiality, we require a Mutual Non-Disclosure agreement signed by both parties.

### ***System Setup***

If you activated your Free Trial using our automated tool then your records have already been set up for you. We may require brief phone conversations with those directly involved with the operation of the system (Web Admin, Sales/Marketing personnel). To configure your products and services you will login at the main EchoQuote™ website using the supplied login id (email) and password.

### ***Trial Period***

The terms of your trial period may vary but there is no cost to you during the Trial Period.

### ***Go Live Agreement (Terms and Conditions of Use)***

At the end of the trial period you will decide if you want to continue the service. If so, we will execute the Terms and Conditions of Use Agreement. If not, we will deactivate the portal and remove all captured lead information from our system.

### ***Begin Processing and Approving Quote Requests***

Once you go live you will want to have a process that approvers follow for different scenarios. This document outlines best practices for getting the most out of EchoQuote™.

## System Setup

### *What We Need*

Once the Non-disclosure document has been signed by both parties, we are ready to set up the EchoQuote service. Setting up EchoQuote™ requires only a couple of items from you; a **primary email address** and several **product/service items**.

#### **Primary Email Address**

At least one primary email address is needed to receive the quote requests and manage the EchoQuote™ service. This address will be the recipient of quote requests generated and will be responsible for denying or approving the requests. Additional email administrators/users can be added using the administration panel.

#### **Product Catalog Items**

The product/service catalog needs to be loaded with several items that you offer. These can be specific items or even typical “packages” that would make sense to someone who is interested in your offerings. Keep them simple without too much detail. Remember, we are only trying to engage prospects, not configure a complete solution.

### *What We Do*

EchoQuote™ staff will then set up your service, load your initial corporate logos and create your catalog. You can always update the service yourself but our goal is to minimize your upfront work for the trial period.

The primary email address will be sent a “Welcome to EchoQuote” email message with your login information. You will access the administration panel by going to [www.echoquote.com](http://www.echoquote.com) and logging in with your email and password provided.

### *What You Do*

Once you’ve received your login information your initial task is very simple. To enable your website visitors to access the EchoQuote service you must place URL links in various places on your site. You may decide to only include one or two initially but they must be prominent. Once links are active on your site, you will start to receive requests in your email inbox with the subject of “EQ-ACTION”. Those are live requests and we discuss them below.

#### **Add Links From Your Site to EchoQuote™**

We recommend using a very visible image like the following that matches the color and style of your site.



See the **Administration Panel > Setup > Link Setup** tab for easy to embed samples.

The matching link URL will be:

<http://www.echoquote.com/portal.php?&refsite=VENDOR&source=SOURCETEXT>

**VENDOR:** This is YOUR company “domain” from [www.DOMAIN.com](http://www.DOMAIN.com)

**SOURCETEXT:** This provides information about portal calling page and is tracked on the quote

Sample:

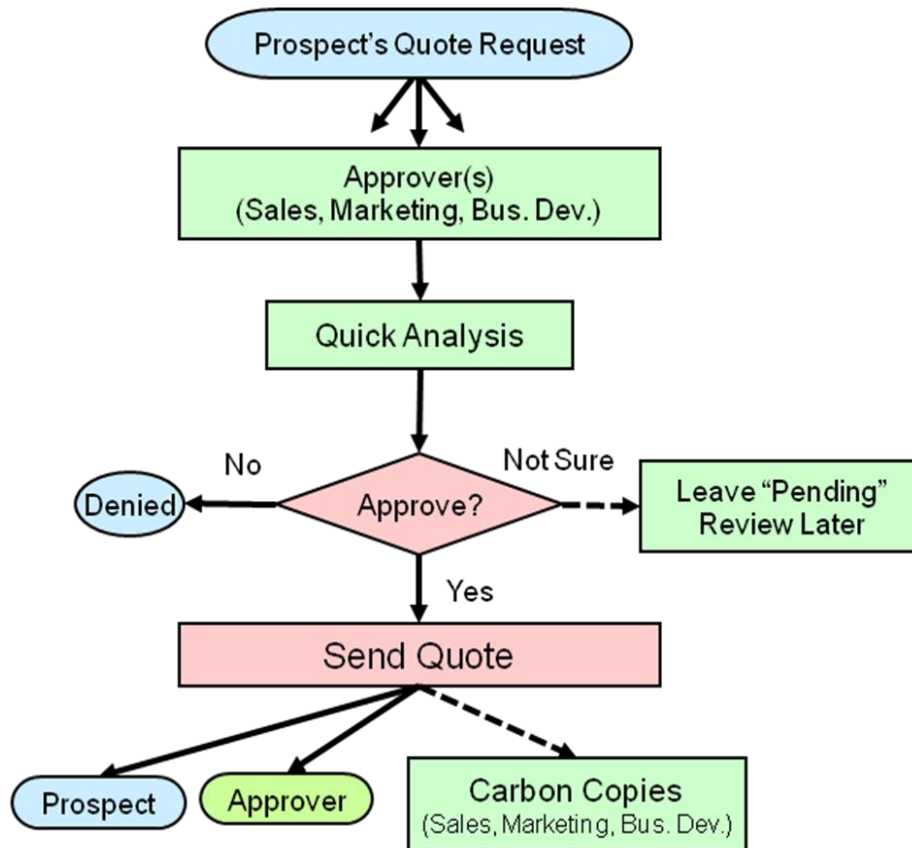
```
<a id=quote href=http://www.echoquote.com/portal.php?&refsite=widgetcorporation&source=webpage1 target="_blank" /></a>
```

## Responding to Requests – the Approval Process

Once EchoQuote™ is live the primary email address will begin to receive emails with a subject of "EQ-ACTION". Those are live quote requests from interested website visitors. What should you do?

You'll want to develop a process to follow for certain situations. It is better to plan ahead to know how to handle certain situations because quotes may be requested at any time, day or night.

The basic process works as follows:



### Quick Analysis

The decision to Approve, Deny, or Review Later depends on what happens during the Quick Analysis phase. The reason we call it quick is that the goal is to make a decision within 2-5 minutes. While we are trying to satisfy the prospects request as quickly as possible, we also need to make sure it is appropriate for **that Individual**, to receive **that price type for those items**. It is always safe to simply not make a decision and Review it later than to approve inappropriate requests.

Analyzing and approving quote requests without knowing exactly who is requesting it takes a bit of practice to get a feel for the process. As you process more requests you will begin to see patterns that help you weed out the bad leads and focus on the higher quality requests.

### Summary

Thank you again for trying EchoQuote™. This document outlines the basic process to begin using EchoQuote™ to capture more high-quality leads from your existing website. More detail can be found in the Administration Panel.

If you have any questions or concerns about how EchoQuote™ would work on your specific website or blog, please use the Contact Us information at [www.echoquote.com](http://www.echoquote.com). We will be happy to help.