

General Guidelines / Best Practices

Welcome to **connectmogul!** **connectmogul** was made specifically for agents and will save your office time, money, and keep manual processes to a minimum. If you have any questions, comments or concerns at any time please don't hesitate to contact us. We are available on the phone, email and via Live Chat.

There are 2 types of text messages that are possible in connectmogul:

1. **Normal oral consent messages:** Birthday, Sign on Date, Holiday, Payment Reminder, Appointment, Retention Mass Texting, and manual messages that you send that **are not** marketing based.
2. **Express written consent messages:** FFR, Bundle, Prospecting, Marketing Mass Texting, and manual messages that you send that **are** marketing based.

Best Practices

Mass Texting: It is recommended that you use the mass texting tool for short, focused messages for a select group of clients. We find that the best results come from targeted messages. Example: There is a major storm in a specific zip code, and you have clients in that zip code. A good message would be: "Checking to see if you are OK from the storm. If you have any damage, please call this claim number.. Example Insurance Agency". Messages tailored towards retention are more widely accepted vs. mass generic texting aimed towards prospecting/marketing.

Know your clients and exercise restraint. Since mass texting is sent to a large group of people, generally check spelling and who the recipients are before clicking send.

Farmers Requirements

1. If a client texts private information to you through the connectmogul system, such as: social security number or credit card information, you need to delete the message immediately.
2. Any claim information that is sent to you via the connectmogul system must be appropriately filed in the Farmers claim system. Connectmogul does not serve this purpose and the claim will never be recognized by Farmers.
3. Be aware of dual messages. Dual messages start out as retention messages, but also may contain prospecting/marketing language. An example of this would be "Happy

Birthday.. would you like a free quote for auto/home/life?”. Do **not** participate in these types of messages unless you have express written consent.

Account Monitoring

Connectmogul is required by Farmers Insurance to periodically monitor communication practices of Farmers agents using connectmogul. This means that if there is excessive negative feedback from clients, the agent’s connectmogul account may be suspended or terminated. Please note that we are required to notify Farmers Insurance of any suspensions or terminations based on this type of activity. Since this is a communication tool, Farmers wants to make sure that you are using it in a way that doesn’t negatively represent the Farmers Insurance Group.

Opt Out

Opt out currently stops all mass texting AND automatic messages, but DOES NOT stop you (the agent) from using the text tool on the right to send a manual text message.