

## Agent FAQ Sheet:

### **ATTENTION ACTION NEEDED:**

- **Important dates:**
  - **March 23 at 5 pm CST:** Email order deadline
  - **March 27 at 5 pm CST:** Direct Mail order deadline
  - **March 31 at 5 pm CST:** Current TaG site shuts down
    - All order history, follow-up lead lists and tax forms must be pulled from your account up until 3/31 at 5pm CST. After this deadline, **these will no longer be accessible.**
    - For tax purposes you will want to run your 2016 Year End Statement in the current TaG site by 3/31 at 5pm CST. If you've placed any orders in the old TaG site in 2017, you'll also want to run a 2017 Statement.

### When is the cutoff date for which I can no longer place orders on the current TaG site?

- March 23 at 5 pm CST: Email order deadline
- March 27 at 5 pm CST: Direct Mail order deadline
  - If you opted-out of the re-occurring order, the final drop date for Birthday Cards will be March 29 (for April 7-13 birthdays).
  - If you opted-out of the re-occurring order, the final drop date for all other recurring orders will be March 31.

### Why are we changing TaG vendors?

- As an ongoing effort to consolidate all Allstate offered agent marketing programs onto one platform.
- Evaluating our options as we have received many complaints on the speed and functionality of the current TaG site.

### What was the TaG "Bake-Off"?

- A test that was run July-August (2016) to decide which vendor would be selected to run the TaG platform moving forward.
- A number of agents (approx.. 90), regions and Home Office employees participated in this test to review and report back on several measurable variables for both proposed TaG vendors. A few variables we measured were site speed, user friendliness and ease of workflow/use.

### Will the platform still be named "TaG"?

- Yes.

### How do I access the new TaG site?

- You can access the site through the Gateway link [here](#).
- Be sure to save it as a Quick Link for easy access.

### What are the benefits of the new TaG site?

- Agent feedback from the TaG "Bake-off" indicated that the new TaG platform is more user friendly, faster and provides a better overall experience.
- Lower 4-color print options available (i.e. no upcharge for including agent photos).
- Because the integration of TaG into Agency Marketing Storefront reduces the number of sites that agents need to visit, we can become more cost effective, which will ultimately decrease the total cost per piece.

#### Where can I access the new TaG platform?

- The platform will be accessible through the same website and URL as Marketing Blueprint, this link will redirect you to AgencyMarketingStorefront.com, where the new TaG platform will live.
- You can still access the current TaG platform through Allstate Gateway [here](#).

#### Will EFS's have access to TaG if I granted them access on the old platform?

- You will need to once again grant the EFS access. In granting an EFS access, he/she will have access to both your TaG and Blueprint accounts.

#### When can I start placing orders on the new TaG platform?

- You can start placing orders on February 23rd using the new TaG platform.

#### When will I no longer have access to the current TaG site?

- 5 pm CST on March 31 will be when the current TaG site is shutdown.
- No orders can be placed after the dates stated above but you will have access to your order history, FUP lists & tax forms until the site shuts down.

#### Where do I go if I have questions on how to navigate the new TaG site and place an order?

- You can locate the New TaG educational tools/resources [here](#), call 866-497-5888 or email [technicalsupport@agencymarketingstorefront.com](mailto:technicalsupport@agencymarketingstorefront.com) with any questions.
- Find How-To Videos & Job Aids [here](#)
  - How to Navigate Marketing Storefront.
  - How to place a TaG List only order.
  - How to place a TaG Customer Email order.
  - How to place a TaG Prospecting DM Letter/Postcard order.
  - How to place a TaG Customer BOB Audit/Mailing.
  - How to place a TaG QuoteBurst/Robo Agent Lead List/Mailing.
  - How to enroll in a Regional Customer/Acquisition Campaign.
- You may also reach out to your Regional Marketing Manager or Sales Leader with questions.

#### Will I be able to locate my order history from the orders I placed in the old TaG site?

- Your current TaG order history will be available until the current site shuts down on March 31.
- Your past order history will not be available on the new site. Your Regional Marketing team will have access to a summary of your order history that will contain campaign name, drop date, volume and cost.
- If you want to save your lead lists for any particular campaign you should download them prior to site shutdown on March 31.
- Please reach out to your Regional Marketing Manager or Sales Leader with needs/questions.

#### How do I locate the TaG creative amongst the Blueprint campaigns on the site?

- There will be separate TaG drop down menu options available on the Agency Marketing Storefront site where you will go to locate all TaG creative, place orders etc.
- For assistance in navigating the site you can locate the new TaG educational tools/resources [here](#), you can call 866-497-5888 or email [technicalsupport@agencymarketingstorefront.com](mailto:technicalsupport@agencymarketingstorefront.com) with any questions.

#### Will there be updates made to the creative that was housed in the old TaG site?

- Yes, Home Office worked to pull out all outdated creative and they also added in newer/refreshed creative to the site for the launch. Additional creative will be added to the site as an on-going effort moving forward.

#### Does my lead data come from the same place now that we are changing TaG vendors?

- No, the lead data will now come from Acxiom.
- Acxiom is an enterprise data, analytics and software-as-a-service company that uniquely fuses trust, experience and scale to fuel data-driven results. For over 40 years, Acxiom has been an innovator in harnessing the most important sources and uses of data to strengthen connections between people, businesses and their partners. Allstate has had a long standing relationship with Acxiom. Acxiom's extensive third-party data offers rich insight into consumers and their behaviors:
- Curated from multiple, reliable sources:
  - Includes more than 1,000 customer traits and basic information including location, age and household details
  - Provides more than 3,500 specific behavioral insights
- For more information about Acxiom, visit [Acxiom.com](http://Acxiom.com). Acxiom is a registered trademark of Acxiom Corporation.

#### Where will my "Lead Challenge" lead lists be housed?

- Please continue using the [current TaG site](#) to access "Lead Challenge" lead lists. They will only be accessible via this site until March 27.
- On March 27, lead lists will migrate to the [Lead Activity Tool](#).

#### How will the Blueprint and TaG charges appear on my EA+ or credit card statements?

- They will both appear as "Marketing Storefront"

#### Will my personalized signature and photo be transferred to the new TaG platform?

- Yes, your signature file and photo has been transferred to the new TaG platform.
- Please make sure to check that your signature and photos are correct within your profile before placing your first TaG order.
- For a job aid on how to upload your signature & photo please reach out to your regional marketing team.

#### When will I want to run my 2016 Year End Statement off the current TaG site?

- For tax purposes you will want to run your 2016 Year End Statement in the current TaG site before 5 pm CST on March 31. If you've placed any orders in the old TaG site this year, you'll also want to run a 2017 Statement.

#### What will the cost per piece be in the new TaG site?

- Standard postcard: **\$0.30** (current price \$0.39)
- Standard Letter: **\$0.32** (current price \$0.44)
- Self-Mailer: **\$0.37** (current price \$0.43)
- Birthday card: **\$0.40** (\$0.48 with Treasured Past Fun Facts data); (current price \$0.49, \$0.61 with Treasured Past)

#### Can my support staff still place orders for me on the new TaG site?

- Yes, your support staff can still place orders on your behalf. If your support staff personnel is already an authorized user, they can log in to TaG with their own user ID and password and simply select your agent number to access your BOB. They can still place orders and/or do audits.

#### Will I still have to upload my QuoteBurst or RoboAgent data file to TaG to complete my Quote letter order?

- No, you will no longer need to upload your QuoteBurst or RoboAgent data file to TaG to complete your Auto First Quote, Auto Requote, Home First Quote or Home Requote mailing. QuoteBurst/RoboAgent will deliver your file to TaG weekly on Mondays and you will be notified via email to complete your order and finish payment through the TaG platform for it to be mailed.
- The weekly cut off to place your quote letter order is every Thursday at 11:59PM.
- The email subject line you can expect to receive once the order has been processed and is ready for you to access in the TaG platform is as follows: "Your (product name; i.e. "Home First Quote") Mail Order is ready to be completed."

#### Will enrollment for regional campaigns still take place on the TaG platform?

- Yes, please find a job aid & How-To video [here](#) for education on how to enroll for a regional campaign in the new TaG platform.

#### What new functionality on the TaG site do I need to be aware of?

- There is now a customization screen in the ordering process flow. Once you've selected and/or updated your customized fields you can preview the creative with your agent photo and/or signature on the creative. You must approve your selections before moving forward with the order process.
- Orders that have not been completed will be saved in your cart if you do sign-off the site.
- Your mail volume counts re-calculate in real time as you apply filters to whom you want to mail to. More flexibility in customizing the audits for both your customer & acquisition mailings.

#### TaG Transition Support:

You can locate the New TaG educational tools/resources [here](#), you can call 866-497-5888 or email [technicalsupport@agencymarketingstorefront.com](mailto:technicalsupport@agencymarketingstorefront.com) with any questions.

- Find How-To Videos & Job Aids [here](#)
- You may also reach out to your Regional Marketing Manager or Sales Leader with questions.

Will I be able to order Blueprint direct mail at any time once the new TaG platform rolls out?

- No, nothing changes from the current Blueprint ordering process.

Within the TaG “search” function, can items be searched for as “Blueprint” or “TaG?” Or both?

- Yes, you can search for those terms within the “item search” field or you can filter by “Target and Grow” within the “Narrow Your Results” box on the left side.

Will the Storefront only have Blueprint, TaG and Digital Presence? Will there be others like BRE, Business Builders and etc.?

- A cost benefit analysis is currently underway to determine which additional marketing platforms will be migrating to Marketing Storefront. The goal is to leverage Marketing Storefront to be a “one stop shop” for all things marketing for agencies.

Are seed letters automatically sent with every order?

- No, if you want a seed mailing you can add your email or mailing address to the mailing list on the “Recipients” page.

Will the prospecting leads be scrubbed out if another agent bought that same ZIP Code radius/filters? If yes, for how long?

- Yes, the leads will be “locked” for 52 days.