TRAVELERS

**Travelers Agent Locator and Location Management Enhancements**

- On October 18, 2021, we will launch new enhancements to our Travelers Agent Locator platform including a location management dashboard experience where agents can add more personalized information about their business and services.
- The Travelers Agent Locator is designed to improve agencies' local search results page rankings in search engines like Google and Bing and to allow searchers an easy way to find an insurance agent near them and quickly request a quote.
- Travelers Agent Locator Dashboard empowers agents to update, expand and personalize their agency location information to help further boost their findability online and increase leads generated to them from their agency page.

## Frequently Asked Questions

### What's different from the Agent Locator launched in May 2020?

- The updated Agent Locator introduces new agency profile elements designed to allow you to expand and personalize the content on your agency location page.
- These enhancements to your agency page can help increase your online visibility even more and help more prospects find and choose your agency online
- You can access this new self-service dashboard on Travelers.com For Agents experience click on "*Agency Tools"* and choose "*Manage Agency Locations*." See more detailed instructions in the following FAQ.
- The Dashboard has a user-friendly interface that guides your agency page administrator on how to easily update your agency location profile.
- A percentage of completeness gauge tells you how close you are to completing your location page profile for best results.

### How can agents review/update their profile information?

- Producer/Location Admin (PLAs) and Agency User Administrators (AUAs) can follow the steps below, which are also shown in these screenshots.
  - On the Travelers.com For Agents site, click *"Agency Tools"* in the top navigation bar.
  - On the "*Agency Tools"* page, click *"Manage Agency Locations"* which will bring you to a newly added landing page named "*Manage Agency Locations*" with two options.
  - Use the "*Agency Location Information Management"* button to access the existing Agent HQ application to manage your basic profile location fields.
    - To review/edit click "Edit." Make your changes and click "Save."
    - Repeat this for each location you are entitled to manage.
  - Use the "*Find an Agent Enhanced Profile Management*" button to access the new Travelers Agent Locator location management dashboard.
    - Complete/review/edit the fields for your agency profile and click "Save" for each field.
    - Repeat this for each location you are entitled to manage by using the "*Select Agency Location"* dropdown in the right rail.

### What does the new dashboard experience look like?

- Basic agency profile page
- Enhanced agency profile page

- Travelers Agent Locator Dashboard page

**What new agency profile information fields have been added?**

- **About Us:** Provide a marketing description that highlights your agency's value and service offerings to prospects.
- **Hours of Operation**: Provide days and times of the week your agency is open or closed for business.
- **Social Channels:** Provide links to your agency's social media sites (i.e. Facebook, Instagram, LinkedIn, Pinterest, Twitter, YouTube).
- **Main Contacts:** Provide primary contact details for up to two individuals, including headshot photos, phone numbers, email addresses, links LinkedIn profiles, and the line(s) of business they support.
- **Request a Quote & Email us:** Provide two separate email addresses 1. Email address to receive delivery of quote requests, 2. Email address to receive general inquiries.
- **Products Offered:** Add the insurance products your agency supports.
- **Holiday Hours:** Add dates and times for holidays and special events that supersede your normal hours of operation.
- **Alert/CAT Message**: When necessary, add a custom message to the top of your agency page for special events or situations, such as temporary closure notices.

**Who can update the agency profile information in the new location management Dashboard application?**

- The same For Agents users who are entitled to manage the Agent profile information in Travelers Agent HQ application will have access to our new Agent Locator dashboard application.

**Is there any change to how agent profile information is managed through the Agent HQ application?**

- No. The access and process for managing basic agent profile information in Travelers Agent HQ application remain the same.

**Where can a user get tips on how to add/update profile fields in the Agent Locator location management dashboard?**

- Adjacent to each profile field in the dashboard is a tooltip icon that you can hover over or click on to get helpful information about each field.
- Many tooltips provide example formats to help guide your editing.

**How long does it take for changes saved in the dashboard to show on the agency page online?**

- Changes to your agency profile saved in the dashboard will typically be visible on your agency page within one hour with the exception of updates to the About Us field and the Primary and Secondary Headshots fields., which can take up to 7 business days to go live.

- The Agency page About Us section and Primary and Secondary Headshots fields must be reviewed and approved by Travelers and may take up to 7 business days to be approved or rejected for non-compliance.

### How will I know if my About Us copy and Primary and Secondary Headshots are approved?

- Travelers will send a status update to the user's email as listed in For Agents when their submission is approved or rejected. When not approved, details on what and how to correct the submission will be provided and you can resubmit your updates for approval.

### What are common things that may not be approved?

- For the About Us field, incorrect information, mentions of competitors, invalid top producer statistics, inappropriate language and promissory messaging are examples of content that may be rejected.
- For Headshots, any photos that are not a professional-looking headshot of an individual representative of the agency, will be rejected. For example, images containing groups of people, logos, buildings, and pets are examples of phots that will be rejected.

### What are the requirements for the Primary and Secondary Headshots?

- Upload a professional headshot image file in jpg (preferred), png, gif or webp format with a minimum 264pixel height x 264pixel width and 5mb maximum file size.
  - For best results, the image file should have the same pixel height and width (1:1 ratio).
  - Add Alternate Text in the field provided using this format: "Headshot of 'Firstname' 'Lastname'" (ex: Headshot of John Doe).

### How is the Dashboard completeness percentage calculated?

- The percent complete is simply the cumulative amount of all the recommended fields that are populated. The optional Secondary Contact and Other Items to Complete sections are excluded from the completeness calculation.
- The completeness gauge is only viewable within the dashboard experience. It is not visible to visitors to your Agency page.
- Because the most complete and engaging agency profiles have the best chance of ranking high in online search results, the gauge is designed as a tool to help encourage agency location managers to fully complete their agency profiles.

### How do I change profile fields in the dashboard that are view only?

- For the fields that are view only, please click the tooltip icon next to the field in question for directions on how to update that field. Data for some Agent Locator fields are pulled in from the Agent HQ application and can be updated there, or by contacting your Travelers agency account representative. Tooltips can tell you where to go to update data.

### Who can agents contact if they need assistance updating their agency profile?

- For questions or help with your agency profile call us.

- For Personal Insurance, please call: 800.243.1334.
- For Business Insurance, please call: 800.842.2522.

## How does the "Email Me" option work?

- On the Agent page, "Email Me" buttons display the Primary and Secondary Contact if an email address has been populated within the respective contact field in the dashboard.
- The "Email Me" option is for visitors to use when they have questions for the specific agency contact but are not necessarily requesting a quote for insurance.
- They will be asked to fill out a short form to provide information about themselves or their business and the question(s) they have.
- When the visitor/prospect submits the form, the information is sent to the specific contact's email address on file.
- It is up to each agency to reach out to the prospect/potential customer as soon as possible and no later than 24-48 hours from first receipt of the email is recommended.

## How does the "Email Us" option work?

- The "Email Us" option is for visitors to use when they have general questions for the agency they are contacting from the Agency Locator page.
- They will be asked to fill out a short form where they can provide information about themselves or their business and pose their question(s).
- When the visitor/prospect submits the form, the information is sent to the designated email address on file for the agency.
- It is up to each agency to reach out to the prospect/potential customer as soon as possible it is recommended they do so no later than 24-48 hours from first receipt of the email.