EngineRoom+

Frequently asked questions

EngineRoom+ will help you promote your Fee Protection Scheme to your clients through tried and tested messaging from Markel. This document will aim to answer any questions you may have about EngineRoom+.

What do I need to complete my account set-up?
You will need the address details of your practice, company logo, and contact information. Once you have registered, you will receive your details within one working day.

When do I inform my clients about my campaign?
We recommend sending a warm-up email to your client list one day before your campaign is scheduled to go live. This email should state that your campaign email will be coming from: noreply@engineroom.uk.markel.com

How do I collect payments from my schemes using EngineRoom+?
There are two payment options available:

BACS – the payment will be made directly into the account for which details have been provided under the ‘settings’ section. Once a client has subscribed, this will need to be declared to Markel.

Markel Payment Portal – If you wish to use the Markel Payment Portal, your Client Services Representative will create and share a URL link for you to use in your campaigns. Markel will reimburse you the mark up on all subscribed clients.

My client has a group of companies - can EngineRoom+ be used for this client?
No, EngineRoom+ can’t be used for a group of companies.

What campaign shall I use for my clients?
There are a number of campaign options to choose from on EngineRoom+; however, we recommend the following:

Business clients – Select the ‘opt-in’ automation option from the campaigns section. This will send a triggered campaign of three emails to your client list.

Business renewal clients – We would recommend that you use the individual ‘opt-out’ campaign option for your clients. This will inform them that they will be invoiced for their scheme renewal unless they choose to opt-out.

Personal clients – We would recommend you use the ‘invite’ email from the standalone email option on the campaigns page.

Please note if you select the automated campaign option, three emails will be scheduled automatically. Your client will continue to receive these even after they have subscribed.

Is the platform compliant with GDPR?
EngineRoom+ is fully compliant with General Data Protection Regulation (GDPR). If a client chooses to unsubscribe from communications, they will be removed from the system so no further emails are sent to them.

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How do I set up my data for EngineRoom+?
You will need to download the CSV file available on EngineRoom+, and input the following for your clients:

- **First name** – this is the first name of your client.
- **Entity name** – the name of your client's business (if they are a sole trader, you can input their full name here).
- **Annual Fee Amount** – this is the figure you are charging your client for their subscription.
- **Client Reference** – this is the reference you use for this specific client.
- **Email address** – this is the email address the campaign will be sent to.*

We recommend you break out your data lists into the following:

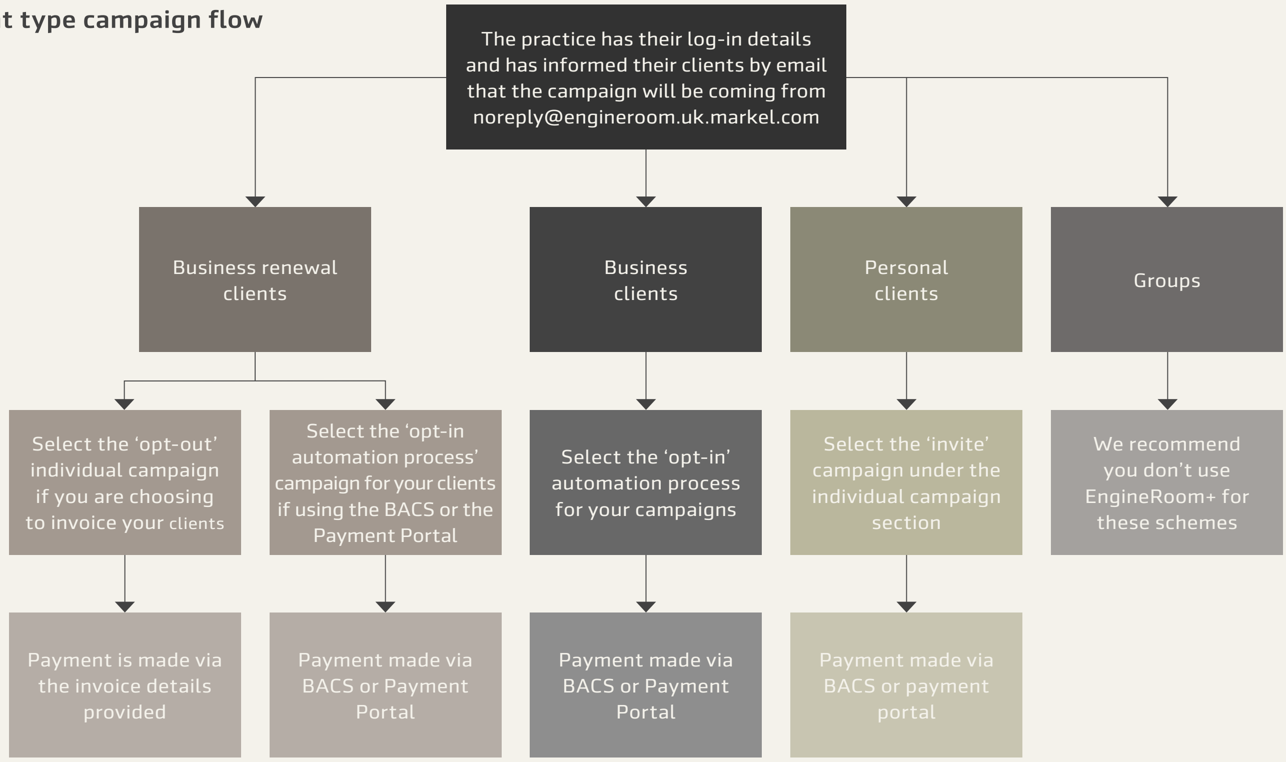
- **Business clients**
- **Business renewal clients**
- **Personal clients**

A client who has the same email address for multiple contacts will have to provide a unique email address for each contact. If not, you will have to make a new CSV file and run a separate campaign for this duplicate.

We appreciate this can be time consuming for you - that's why we offer a Managed Service plan. For a small fee all the administration and campaign set-up is managed by Markel.

*Please note that the system removes all duplicate data, therefore, each data set can only have a unique email address once.

Client type campaign flow



If you have any questions on EngineRoom+, we would recommend you speak to you Client Services Representative.

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