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The Digital Office:

Processes and resources to make you connected
in the digital age!

Wi-Fi Information

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Session Objective

- ▶ Understand why the move to a digital office is an important step for your agency.
- ▶ Discuss how to develop a plan to move your agency towards digital.
- ▶ Show you HawkSoft tools and workflows that will aid efficiency, remove printed paper from your office and assist you in staying in contact with your clients.

The Digital Office – The Beginnings

- ▶ In 1975, *Business Week* hailed the coming of “a PC on every desk” and the start of the paperless office. (*One of those predictions came true...*)
- ▶ The first email was sent in 1971 by developer Ray Tomlinson and became widely used starting in 1988.
- ▶ IVANS started download in 1983 and currently works with over 32,000 insurance agencies and over 400 MGAs. In later decades, Progressive and Team-Up started providing proprietary downloads.
- ▶ GammaLink, Inc developed the first PC-to-fax system, dubbed GammaFax, in 1985.

The Digital Office – The Beginnings

- ▶ In 1993, Adobe Systems created the PDF standard, designed as a multi-platform tool to view and store documents.
- ▶ The first text message was sent December 3, 1992 by engineer Neil Papworth – it read simply “Merry Christmas”.
- ▶ The Electronic Signatures in Global and National Commerce Act (ESIGN Act) was enacted by the United States Congress on June 30, 2000 and mandates that a contract or signature “may not be denied legal effect, validity, or enforceability solely because it is in electronic form”.

The Digital Office – Today

- ▶ Over 205,000,000,000 emails are sent every day and is still recognized as a viable means of communication. *(Source: Forbes | 2017)*
- ▶ 68% of Millennials admit to texting on a daily basis – 47% of Gen X admits to the same practice! *(Source: Forbes | 2017)*
- ▶ Surveys indicate that a majority of Americans shop online and 51% perform banking online. *(Source: Pew Research Center)*
- ▶ Even still, there are 65,395,000,000 sheets of paper generated in the United State every day! *(Source: Esker, Inc.)*

The Digital Office – Why my agency?

- ▶ **Paper:** Paper is simply less secure. When sending via post, it gets handed from person to person until it finally sits outside of their house in a box for a few hours. Leaving documents on your desk and in plain sight at your office can violate privacy laws. By the way... have you noticed the clutter?
- ▶ **Ongoing change consumer expectations:** We live in a high tech world that comes with high tech expectations. Many of our consumers want to communicate and transact business "on the go". Remember...direct writers are already doing this almost entirely!

The Digital Office – How should I begin?

- ▶ Make the financial and time commitments to start utilizing more digital tools at your agency and begin from there.
- ▶ Get **all of your staff** on board! Provide information and employee training on the tools necessary to move from a traditional “paper” office to digital.
- ▶ Proceed with the understanding that the move does not have to happen all at once! Start with small and obtainable changes and move forward from there.

The Digital Office – How should I begin?

- ▶ In addition to your employees; train your **clients**. Some will have to adjust to your new methods and there are those that will want to do business in the way that they are accustomed. Be flexible and work with them. Many **will** acclimate.
- ▶ Most importantly, know the systems and integrations that **HawkSoft** extends you to assist in making this move to digital one that can be manageable.

How Can HawkSoft Help You Go Digital?

- ▶ Downloads: Policy, Commission, eDocs, Claims
- ▶ Client Types: Personal-Commercial-Carrier-Vendor-Employee
- ▶ Acquire/Scan (*Strongly consider a network scanner*)
- ▶ ScratchPad
- ▶ Email / Drag and Drop
- ▶ HawkSoft Virtual Printer
- ▶ eSignature
- ▶ Texting (*Be mindful of **Opt-in requirements***)
- ▶ eFax (*Print from HawkSoft direct to your eFax vendor*)

Conclusion

- ▶ Don't concern yourself with becoming completely digital all at once.
- ▶ Pick one or two priorities, implement them, and decide on the others to follow.
- ▶ Make certain that employees are on board. Remember, it starts from the top - your enthusiasm will equal theirs!
- ▶ Use **HawkSoft** to simplify your policy information, contacts, documentation, and client communications.

Questions & Discussion
