



# Marketing in HawkSoft

No Cost Marketing in your Management System

**WIFI Username:** [info@hawksoftusergroup.org](mailto:info@hawksoftusergroup.org)

**WIFI Password:** 888641

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No Cost Marketing in your Management System



# Introduction

Kenneth Hendricks  
Product Marketing Coordinator

Joined HawkSoft in August 2015



Why are we here?

Marketing automation is expensive.

HawkSoft has a suite of marketing features available at no additional cost.

Learn fundamentals with HawkSoft.



Who is this session for?

Marketing rookies.

People with too many hats.

Motivated sales professionals.



# What will we cover?

## Features:

- Correspondence Templates
- Advanced Reports, Agency Intelligence, and Sales & Retention
- Batch Email



# What won't we cover?

1. Marketing Automation Platforms (HubSpot, Marketo, etc)
2. Website Builders
3. Sales Platforms



# Part I – Decide

*The art of marketing is the art of brand building. If you are not a brand you are a commodity. Then price is everything and the low cost producer is the only winner.*

(Philip Kotter)





What are you about?

Decide what your agency is  
passionate about.



Advanced Topic: Voice & Tone

See MailChimp's Style Guide on  
Voice and Tone

<https://styleguide.mailchimp.com/voice-and-tone/>



# Where will you be?

## Website

- Add Google Analytics (its free)

## Social Media

- Where are your people at?
- Pick a lane and master it



# Monthly Editorial Calendar (A)

Ask yourself:

- What do I want to say? What do I want the reader to do?
- How do I best communicate this?



# Part II – Prepare

*Time spent sharpening the axe may well be spared from swinging it.*



# Monthly Editorial Calendar (B)

Write everything down

Timing is Important

See: <https://coschedule.com/blog/best-times-to-post-on-social-media/>

Send emails Tues – Thurs, experiment with timing



DO NOT SPAM

# Correspondence Templates

## Merge Fields

- Customize for a personal touch

## Custom Input Fields

- Extra personalization for semi-automatic emails

## Categories





# To HawkSoft!

Demo of creating an Email Template



# Batch Email (A) – Setup

User Profile for Kenneth Hendricks (KAH)

General

Preferences

Information

Agent Signature

Calendar

Email

**Batch Email**

Text Messaging (SMS)

E-Signature

Phone Dial-Out Integrati...

### Batch Email

Use general Email SMTP settings for batch emailing.

Batch Email SMTP Settings

Email Address

SMTP Server

Port

Use encrypted connection (TLS/SSL)

Leave User Name and Password blank if the SMTP server does not require authentication.

User Name

Password

Advanced Batch Email Settings

Send no more than  Emails per minute.

ATTENTION - Batch emailing will be done at your own risk. HawkSoft will not be liable if you are Black-Listed. Please check with your ISP AND email provider prior to attempting batch email to find out the limit of emails that can be sent per minute so that you do not get black-listed by your provider.

Send test email to email address listed above...

**SMTP  
Settings**

**Very important setting!  
Check with your ISP  
/ Email Provider**



# To HawkSoft!

Demo of setting up Batch Email in the User List



# Part III - Execute

*There are two ways to get traffic to your website. You either pay for it (advertising), or you earn it (blogging and social media). Both have costs.*

(Becky Schroeder)



Define your audience

Use the shortcuts offered in Agency Intelligence and Sales & Retention reports

Save the report!



# To HawkSoft!

Demo of running a report and saving it



# Batch Email (B) - Launch



Select Email Template

Select an Email Template:  
Update Notice to Online - Version 4.6

OK  
Cancel

Select which items to Email:

All Items  
 Selected Item(s)  
 Range of Items 1 to 2

Create log entry on each client emailed  
 Attach a copy of Email to each client  
 Suspend Transaction (Tickler)

Suspense Date  
Assign to KAH -- (Current User)  
Priority 5 (Lowest)  
Category

(For an open transaction, leave date blank.)

Select who

Document it

# Batch Email (B) - Launch

From: HawkSoft <marketing@hawksoft.com>

To: Primary Email

Cc:

Bcc:

Subject: Version 4.6 coming in April  Request Read Receipt

Arial

We will begin updating HawkSoft CMS to Version 4.6 starting on April 3, 2019. As a customer of our online solution, **no action is required on your part to complete this update.** We will handle the update process.

**New**

- Phone Integration now available for HawkSoft Online customers (more information on this will arrive with the release of HawkSoft Version 4.6)
- Launch Google Maps from any address
- See Payment Plans on the General Policy Info screen
- Create a log note by right-clicking on an Attachment
- Override term options for Commissions

Display Name <from-email@domain.com>



**Proofread!**



# Batch Email (B) - Launch



Start Report Generator Email Process

**Notification**

Please enter an email address below if you want to be notified when report emails have been sent.

khendricks@hawksoft.com

Click the Test Email button to send a confirmation email to the address entered above.

**Options**

Enter an optional name to help identify this emailed report.

Update Notice to Online - Version 4.6

Enter an optional start time.

03/29/2019 09:03AM

Clients with multiple policies might appear on this report multiple times. How do you want to send this email?

One per Client

**Advanced Settings**

Override client's Mass Email setting

Always test first

Set it, and forget it!

Don't spam

Override client's Mass Email setting

OBEY CAN-SPAM

# To HawkSoft!

Demo of sending an email campaign via Batch Email



# Social Media

Document what you do, don't  
fabricate content

Be consistent and involved



# Tracking Results

Use the saved report to observe changes in KPIs

*This is where our no cost approach can fall short.*



# Tracking Results - Advanced

Remember Google Analytics?

<https://ga-dev-tools.appspot.com/campaign-url-builder/>



# Conclusion

*If you know the answer, ask bigger questions.*

(Taken from an OHSU billboard)



What are you going to take  
back to your agency?





# Resources

HawkSoft Training Videos

<https://blog.hubspot.com/>

<https://moz.com/blog>

[marketing@hawksoft.com](mailto:marketing@hawksoft.com)

