Personal Lines

“Everything you do should be done in the system”

How can these features and processes help my agency?

Scenario #1: Prospect calls in to office for a quote

Scenario #2: Prospect decides to sign up

Key Information to Document

- To get the most accurate and helpful information from Agency Intelligence and other reports, it's important that your data is entered **correctly** and **consistently** in CMS.
- Be sure to enter the correct **Inception Date** for a new policy. This data is key when determining which policies should be included in several different reports.

Log Note Templates

- Log Note Templates are a great way to **standardize** agency notes and procedures, and also make **repetitive** notes more efficient.
- Use them to create **check-lists** that remind staff what needs to be completed during specific processes, like the application process.

Virtual Printer

- Help your office become a **paperless** office, enabling staff to attach documents directly to HawkSoft from a myriad of different sources like webpages and other programs.
- Use the Virtual Printer to compile multiple documents from many different sources into one single PDF file, customizing the order of pages, that is easily attached to a client in HawkSoft.

Suspenses

- Use Suspenses to create and work your very own **to-do list** within HawkSoft CMS.
- Enable Default Suspenses for your agency, **automating** the creation of suspenses when performing common tasks.

HawkSoft E-Signature

- Offer **convenience** to my customers allowing them to sign documents from their mobile phone, tablet, or computer, saving them from the hassle and time of printing, signing, scanning, and emailing paperwork.
- Enable staff to quickly and efficiently send documents for e-signature from within HawkSoft CMS, eliminating the need for paper, getting documents signed faster.
- Help mitigate **E&O exposure** with a digital record.

Scenario #3: Policy is coming up for renewal

Personal Lines

“Everything you do should be done in the system”

Additional Resources

HUG Facebook Group

- If you haven’t already, don’t forget to sign up for the **HawkSoft User Group (HUG)** Facebook group. Here you’ll find a home with fellow agencies, that includes great conversation and a variety of downloadable resources.

Scenario 1: Prospect calls in to the office for a quote

- Video Course on **Inserting a Prospect**. The videos within this course will cover how to insert a prospective client or a prospective policy on an existing client, and enter policy information such as terms, lines of business, coverages, and more.
- Video Course on **Tracking a Prospect**. The videos within this course will teach you how to obtain carrier quotes directly from CMS using HawkLink Toolbar or from an ACORD form, how to receive and document quotes from a carrier, and lastly how to offer quotes to a client.
- Article on **Best Workflow Practices for Accurate Reporting**
- Video on **Required Fields**
- Article on **Required Fields**
- Article on **Client Miscellaneous Information**
- List of **Comparative Raters**
- Article on **HawkSoft Rater Overview**
- Video on **Policy/Company Setup**
- Video on **Customizing Sub-Statuses**

Scenario 2: Prospect decides to sign up

- Video on **Submitting and Binding a Policy**
- Video on **Issuing a Policy**
- Article on **Best Workflow Practices for Accurate Reporting**
- Article on **Log Note Templates**
- Video on **Using HawkSoft E-Signature**
- Article on **HawkSoft Electronic Signature Overview**
- Article on **The HawkSoft Virtual Printer**
- Video on **Introduction to Suspenses**

Scenario 3: Policy is coming up on renewal

- Video on **Renewing a Policy**
- Video on **Remarketing a Policy**
- Video on **Sales and Retention Reports**
- Article on **Sales and Retention Reports**