Personal Lines

"Everything you do should be done in the system"

With Michael Ley and Jake Dunbar

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Scenarios for today...

Prospect calls in to the office for a quote

Prospect decides to sign up

Policy is coming up on renewal

Personal Lines

"Everything you do should be done in the system"

Session Description

"Beginner / Intermediate. You have the system and you have the client download. That's all you need right? This session is designed for those that are using the system and maybe there are gaps that you sit back and think "I could definitely be using this system better." Processes are designed to make our jobs easier. HawkSoft has processes for every aspect of your agency but are you using the system to your advantage? Find out how to use the system for Leads, Prospects, converting those to close business, endorsements, downloads, Rewrites, Marketing, and more.

Session Outline

Welcome & Introductions
(5 minutes)
by Michael

- Introduction of presenter
- How to ask questions - Whova app & index cards passed upfront for Q&A
- Flow of the session
- HUG - Facebook Group

by Jake

- Introduction of presenter
- WIFI Information
- Handout: Additional Resources

Start w/ General Rule

- If it isn't in Hawksoft, it never happened!

Scenario 1: Prospect calls in to office for a quote

by Michael Ley (20 minutes)

- Quick search for the name in the system (Why - clean data)
- Required fields (What fields admin sets up as required)
    - Have a list of things that may be required
- What information to enter into system (auto, home, dwelling, cycle, etc)
- Misc Tab - what do you use these for? What can you track
- Quote Sheets - not everyone enters directly into Hawk when prospect calls in. How to import/put in data from paper quote sheets
- Status - how to use the status

Scenario 2: Prospect decides to sign up (converting prospect to new business/client)

by Jake Dunbar (20 minutes)

- Stress documentation during this process
  - Why? (1) reduce E&O exposure, (2) quick reference, (3) insightful reporting, (4) unlocking more value/features
- When gathering additional underwriting and policy details
  - Use HawkSoft to document additional underwriting and policy details (show & tell)
    - Dates, Status, Source, Quoted Premium, Current Rate, Coverages, Agent123, Contact Info
- When submitting the application to the carrier
  - Use **Log Note Templates** (what, how, why) (show & tell) (1-min success story)
  - Use the **Virtual Printer** to capture application and documents (what, how, why) (show & tell)
  - Use a **Suspense** to remind you to follow-up and ensure the new policy issued correctly (what, how, why)
- When acquiring signatures
  - Use **HawkSoft E-Signature** (what, how, why) (show & tell) (1-min success story)

Scenario 3: Policy is coming up on renewal

by Michael Ley (15 minutes)

- Discuss renewal process
    - How far in advance do you touch base with clients?
- Check sales/retention reports
- How far in advance do you remarket/hold account review
- Rewrite/Replace
- Reports