



**3<sup>rd</sup> Annual  
National HawkSoft User Group Conference  
April 4-5, 2019  
The Orleans Hotel & Casino – Las Vegas**

**Renewal & Rewrites for Commercial Lines**

**Thursday, April 4<sup>th</sup> – 11:00 – 12:15**

**Presenters: Agents, Michael Ley – Cindy Steinbach**

**Let's get a good start by understanding the Power of Company Setup**

History – Turn it on or off

Customizing Lines of Business

The benefits of defaults

Policy Titles – consistency is the key for accurate Agency Intelligence Reports

Programs – different uses especially with Surplus Lines

**New Business / Re-writes**

Where do you start – HawkSoft or ACORD – let's talk about it

Understand Status and the importance of “Re-write” – affects Retention Number in Agency Intelligence

**Downloaded Renewals**

Do you Overwrite or Create a New Tab

Did you know you can get Uprate Alerts

EDocs

How are you using

Make sure you are getting all available

Forward on to clients

Attaching – Where - Category

Watch your download for Company Unique Codes that don't make sense – these can be fixed for ALL

**Non-Downloaded Renewals / New Business**

Overwrite / New

History Turn – On

Company Set Up – Customize It – It will save you SOOOO much time

**Processes:**

- Certificate List
- Certificate Generation – Doing a Master
- Lists: Driver – Vehicle
- Reviews: Letters (Template Library) - Proposals