

Seven Tips to Immediately Enhance your use of HawkSoft

How might these tips help my agency?

Agency Announcement

- Convey leadership language to help the morale of your personnel.
- Announce vacations for staff so they may plan.
- Public events to influence staff to attend

Sales Pipeline

- Effectively manage prospects so that staff can close more sales.
- Effectively manage producers to hold them accountable for quotas
- See additional tips on Sales Pipeline further below.

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.

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, eliminating the need for paper, getting documents signed faster.
- Help mitigate E&O exposure with a digital record.

Batch Emailing

- Send a personalized email to all of your clients sharing important news or simply wishing them a happy holiday, all in one batch.
- Use HawkSoft to share marketing messages with your leads and prospect customers.
- Send an email to all of your customers with renewals coming up, inviting them to visit with you, to review their coverage.

Integration with QuickBooks

- This tip is essential to having full control over your BOOKS

Opening an Additional Instance of HawkSoft CMS

- In times where you need to refer back to a client or policy, you can type Ctrl-Alt-N to open a new window.

Additional Tips for Sales Pipeline

- Line of Business STATUS is HawkSoft generated and cannot be changed. The agency MUST define each status and how it will be used
- Lines of Business SUB-STATUS can be customized for your agency. Again, figure out WHAT types of sub-status you want to use and define it for all.
- Pipeline reports run off of two dates:
 - Status Date
 - Effective Date
 - Status Date is always in the PAST
 - Effective Date is always in the FUTURE
- We use Effective dates as the primary means of prioritizing our workflow for the day, week and month
- PL needs to be worked in discovery approximately 30-45 days out and CL needs to be worked in discovery 90 days out
- Use submission and quote sub-status where applicable. You can sort by “application type” to find out what side of your agency is performing
- Create a PROPOSAL sub-status and then create a correspondence template that allows you to email “proposal follow-ups”. Customers will appreciate this seeing as they are shopping multiple agencies and others rarely do this. We have closed a lot of new business from this tactic.
- Create a SOLD PENDING sub-status to allow:
 - Reminders for your agents to call/bind policies on the proposed effective dates
 - Management the ability to see pending sales that will affect revenue numbers
 - Create needed sub-statuses under Refusals and Rejections
- Use these sub-statuses to market next year or the next term of the policy seeing as most of the underwriting was already obtained.

Additional Resources on Tips

Agency Announcement

- [Video on **Default Suspenses & Agency Announcements**](#)
- [Article on **Agency Announcements**](#)
- [Blog post on **5 Ideas for Getting Started with Agency Announcements**](#)

Sales Pipeline

- [Video on **Sales and Retention Reports**](#)
- [Article on **Sales and Retention Reports**](#)

Virtual Printer

- [Article on **The HawkSoft Virtual Printer**](#)

HawkSoft E-Signature

- [Introduction of **HawkSoft E-Signature**](#)
- [Video on **Using HawkSoft E-Signature**](#)
- [Article on **HawkSoft Electronic Signature Overview**](#)

Batch Emailing

- [Article on **Batch Emails**](#)
- [Article on **Batch Email Setup**](#)

Integration with QuickBooks

- [Blog post on **Quickbooks and Hawksoft – A Marriage Made in Heaven**](#)
- [Brochure on **A Comprehensive Accounting Solution**](#)
- [Article on **QuickBooks Integration Overview**](#)

Opening an Additional Instance of HawkSoft CMS

- [Article on **CMS Keyboard Shortcuts**](#)
- [Video on **The Client File**](#)