



# 7 Tips to Immediately Enhance your use of HawkSoft

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**Agency Announcement**

**Sales Pipeline**

**Virtual Printer**

**E-Signature**

**Batch Emailing**

**QuickBooks**

**Ctrl-Alt-N**

# Why do you need to implement?

- A. Do you really know how many prospective policies you have in your pipelines? Personal lines and commercial? How many auto quotes are in submission? How many do you have proposed awaiting reply from your customers?
- B. Discuss how you used to rack your brain on the who's and why's behind quote requests from real estate agents in the past or a customer calling a week after he had called before only for an account manager to not be able to find the quote sheet.
- C. Bottom line: by **CREATING POLICY, DEFINING GPI FIELDS IN CMS, & REVIEWING THE REPORT 2-3 TIMES A DAY**, Beacon Insurance has not missed a quote, date or deadline since we implemented this last year.

# What's the big picture on how to use it?

- A. This is YOUR REPORT – OWNERS / MANAGERS need to DEFINE AND MAKE POLICY in order for it to work. If you have 5 different agents doing 5 different things, this report will never be accurate nor will it ever work.
- B. WHAT TO YOU WANT TO KNOW? As an owner, I'm going to tell you what I want to know:
  - i. How many homeowners quotes I have in discovery, submission, quoting completed, and proposed
  - ii. After refining my agency last summer, I now know how many proposals I have for every line of business
  - iii. When you do it correctly and use the sub-statuses in CMS correctly, you'll eventually get to see how many proposals you lost due to price
  - iv. If you want to learn how to do this, please go see my COO who is co-facilitating the practical application course tomorrow (Sales & Retention: Practical Application)

# How far can you go with it?

- A. If managed properly, you can accurately see how full (or low) your pipelines are at any time
- B. You can project revenue based on creating a sub-status that is titled “sold pending”
- C. You can prioritize big accounts after proposals based on quoted premium volume and proposed effective dates
- D. You can develop correspondence templates that allows you to market to customers that didn't buy from you in the months and years to come (we are currently writing 3-5 new home policies each month simply by sending a canned email to customers who refused us on price from a year ago by asking them to let us requote their home again.....they're shocked we remembered them!)

# Why wouldn't you use it?

- A. Since my agency did everything I just discussed. We have the following successes to report:
- i. Our close ratios for new business has grown from 25% to north of 33%
  - ii. Our revenue in the last two quarters of 2018 and the first quarter of 2019 is up 11.76%

# What's Next?

1. Handouts (Whova App)
  - a. Additional Resources
  - b. Benefits
  - c. Notes on Accounting
2. Training Videos & Help System
3. Consultants
4. Customer Service