AppX Sales Program Setup and Reporting Guide for HawkSoft Users

AGENCY PERFORMANCE

PARTNERS

About your trainer
Stephen Harrington-Descoteaux

Stephen Harrington-Descoteaux, CIC has more than 15 years of insurance management experience. After eight years of restaurant and retail management experience, he turned his focus to the insurance industry. As an agency trainer, power HawkSoft user, and process creator, he brings his fresh vision and insight to the quickly changing business world. He believes that everyone can be successful with proper training and encouragement. His passion lies in helping agencies succeed by building training and business plans around the agency's culture. Stephen obtained his CIC designation in 2009 and has since built a strong network in the insurance community. Through building relationships, speaking at national conferences, networking, and personal branding. He stays on top ranging from current technology, insurance, office, marketing, and management trends by attending several conferences each year as well as reading various trade publications and blogs. He has a strong understanding of the information that insurance agents need to succeed.

"BE YOURSELF. BE BOLD. BE DARING. BUILD YOUR OWN TRIBE. SURROUND YOURSELF WITH PEOPLE YOU ADORE. IT MAKES LIFE SO MUCH BETTER. IF WE ALL DRANK TEA THERE WOULD BE NO TEQUILA." -STEPHEN

Best Friend to Insurance Agents

Over the past several years, Stephen has spent time working on his own brand, Diva of Insurance, and working with HawkSoft agents to clean their data, create custom AMS processes, and train new management members on reporting and monitoring through their management system. Through accountability and training, he has helped agencies grow and often exceed their goals. By joining the team at Agency Performance Partners, Stephen is able to serve his customers more effectively by working alongside a team of professionals highly regarded and deeply entrenched in the industry that he loves so much.

AGENCY PERFORMANCE
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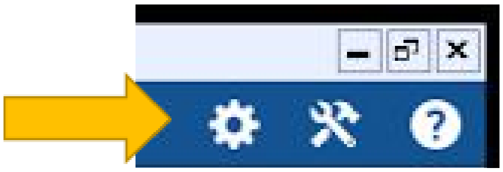
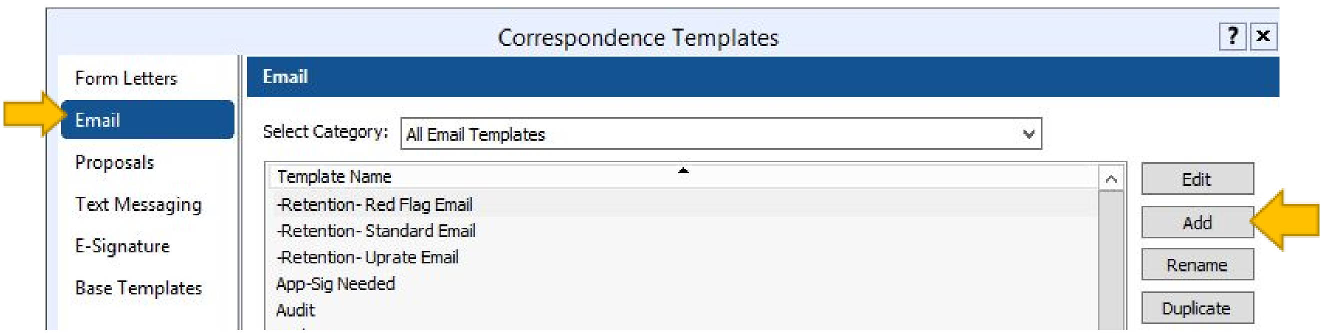
Setting up Templates

Email Templates

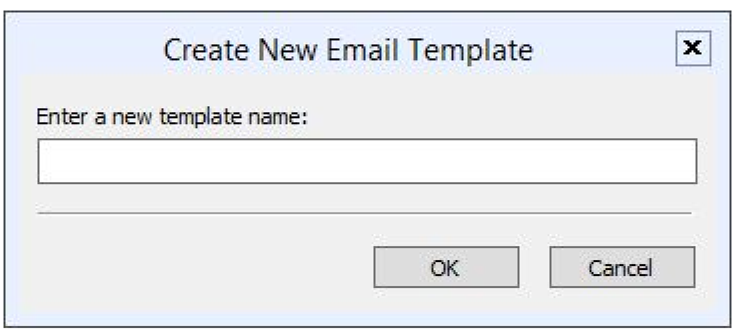
Click on the Cog in the upper right hand screen, then select “Correspondence Templates”



A new screen will open. You will need to Click on “Email”, then “Add”

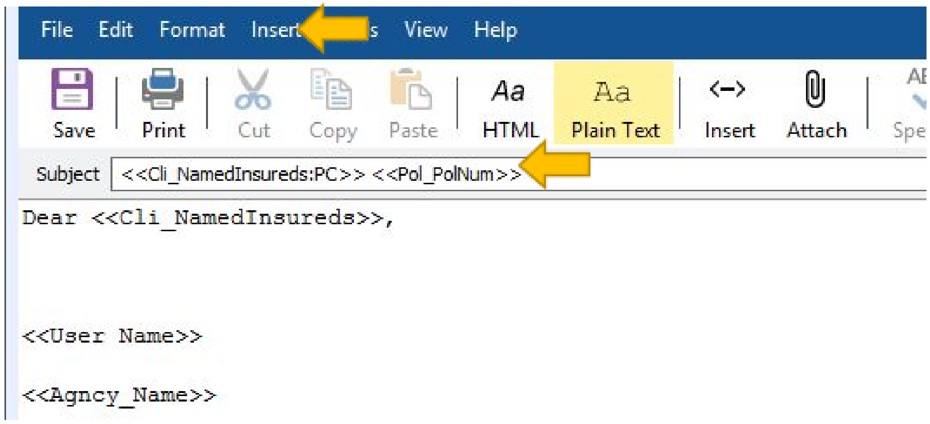


The “Create New Email Template” window will open

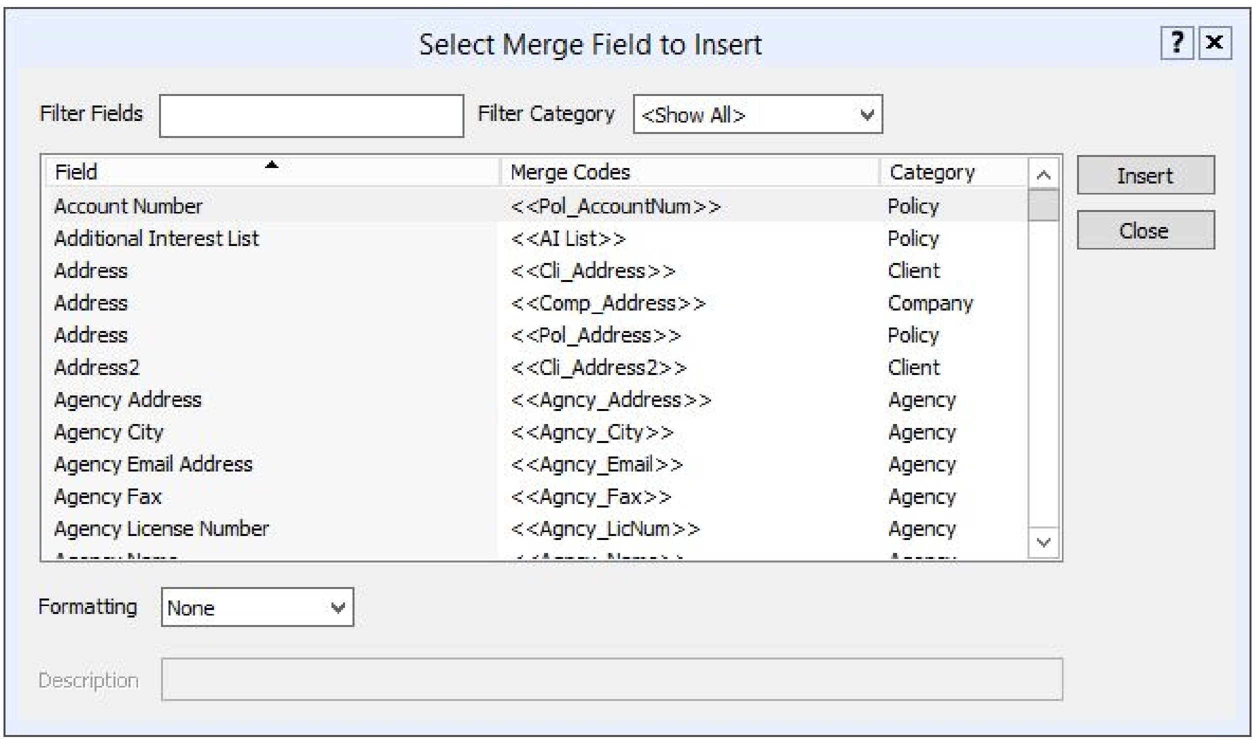


Enter the New Template Name and the click “OK

The Email Template Editor will open



By clicking on “Insert” then “Field” a list of available merge fields will open.

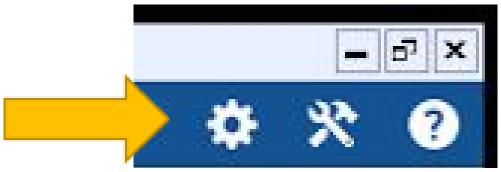


Select the Field you would like added to the letter then click “Insert” one time.
Click “Close” and the Merged Field will now be in the letter.
*By adding the appropriate fields to the Email the information will pull directly from the client file into the letter.
Click the “Save” to save your template to the library.

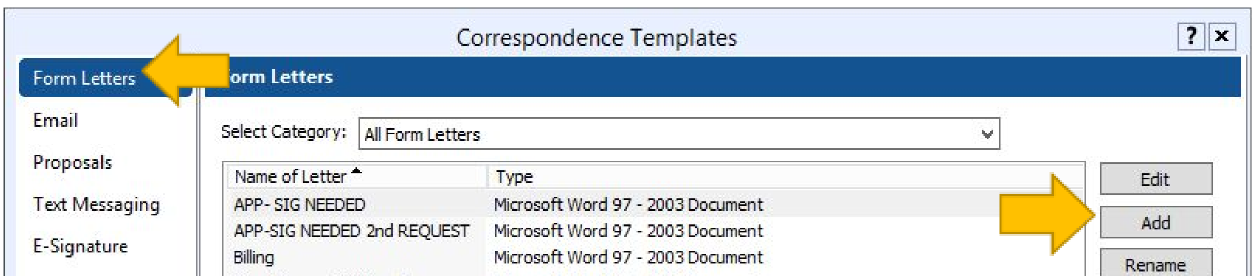
***A list of recommended Email Templates can be found in the Sales Guide or by reaching out to your APP trainer.**

<u>**Form Letter Templates**</u>

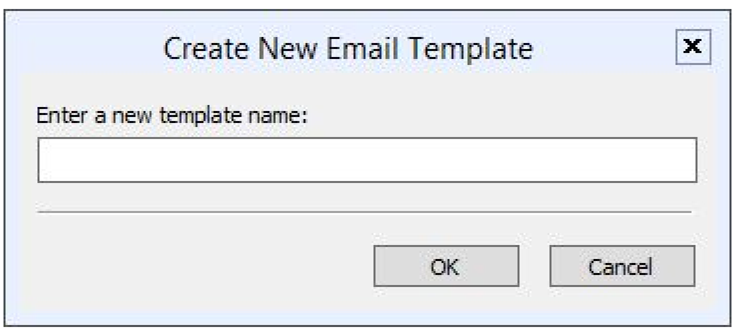
Click on the Cog in the upper right hand screen, then select "Correspondence Templates"



A new screen will open. You will need to Click on "Form Letters", then "Add"

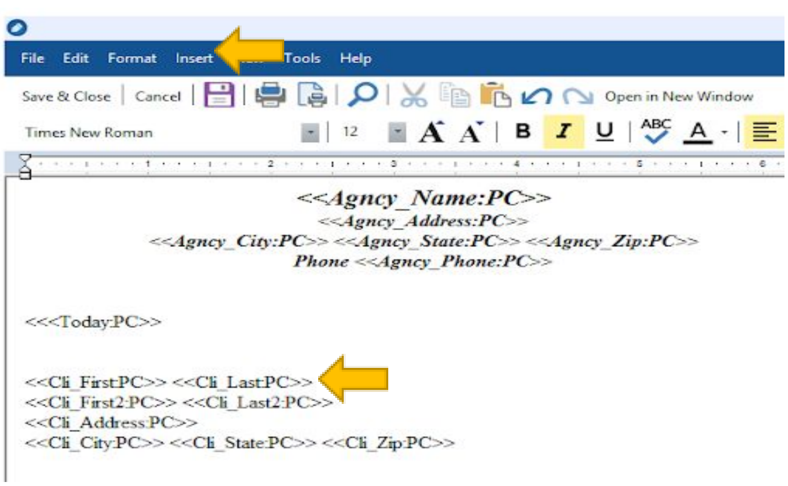


The "Create New Email Template" window will open

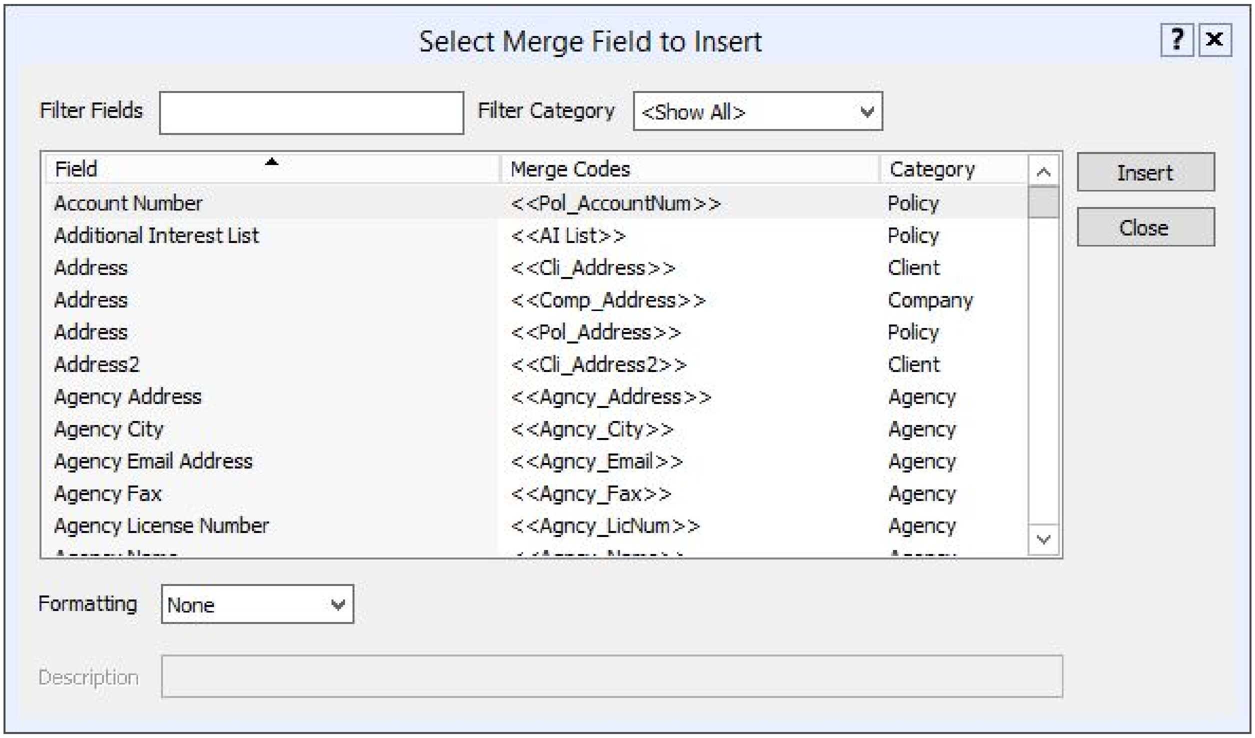


Enter the New Template Name and the click "OK

The Mail Template Editor will open



By clicking on “Insert” then “Field” a list of available merge fields will open.



Select the Field you would like added to the letter then click “Insert” one time.
Click “Close” and the Merged Field will now be in the letter.
*By adding the appropriate fields to the Form Letter the information will pull directly from the client file into the letter.

Create a new letter for the following:

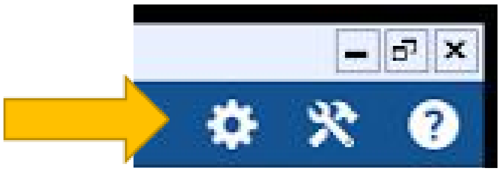
-Retention- Bad Contact

Click the “Save & Close” to save your template to the library.

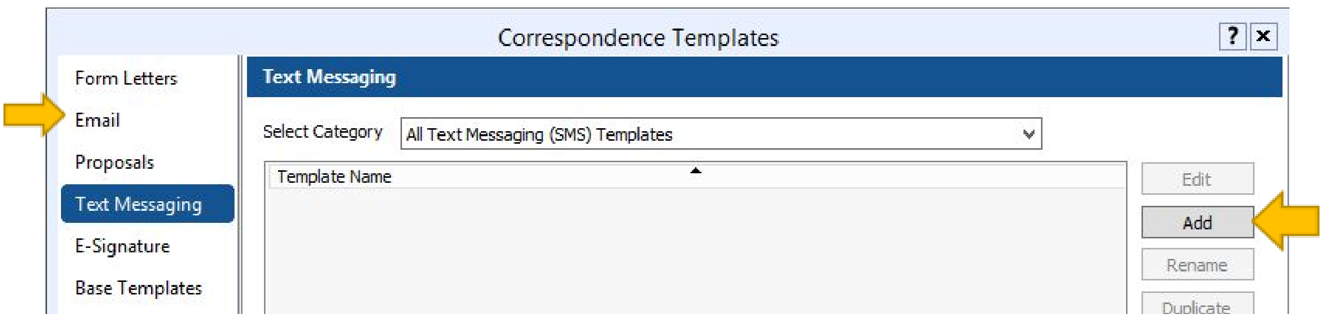
***A list of recommended Letter Templates can be found in the Sales Guide or by reaching out to your APP trainer.**

Text Templates

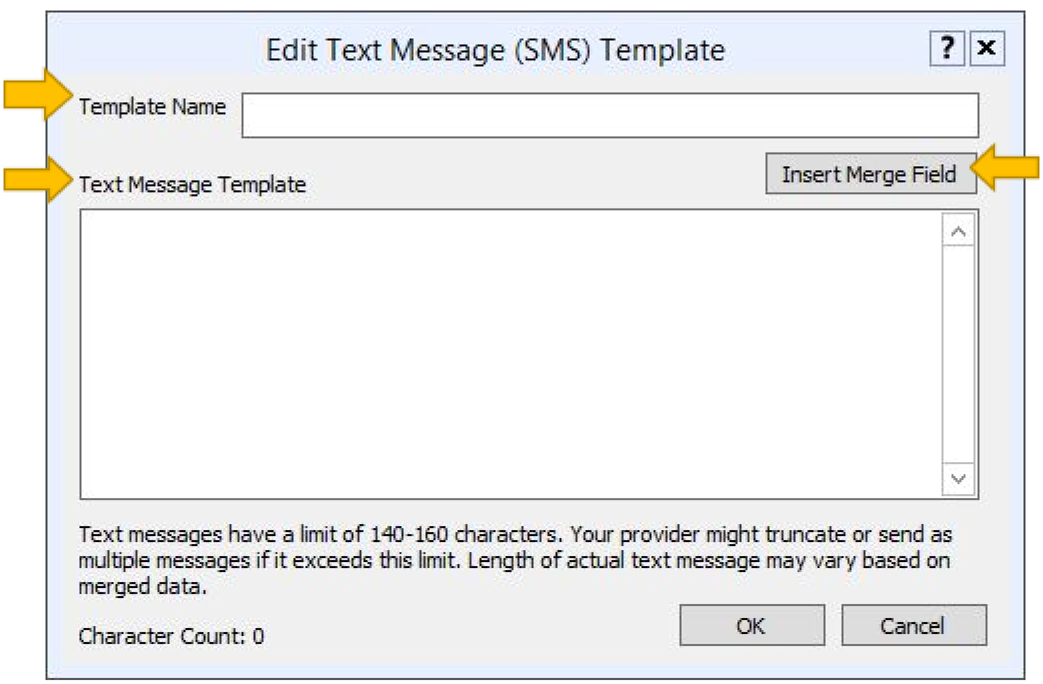
Click on the Cog in the upper right hand screen, then select "Correspondence Templates"



A new screen will open. You will need to Click on "Text", then "Add"

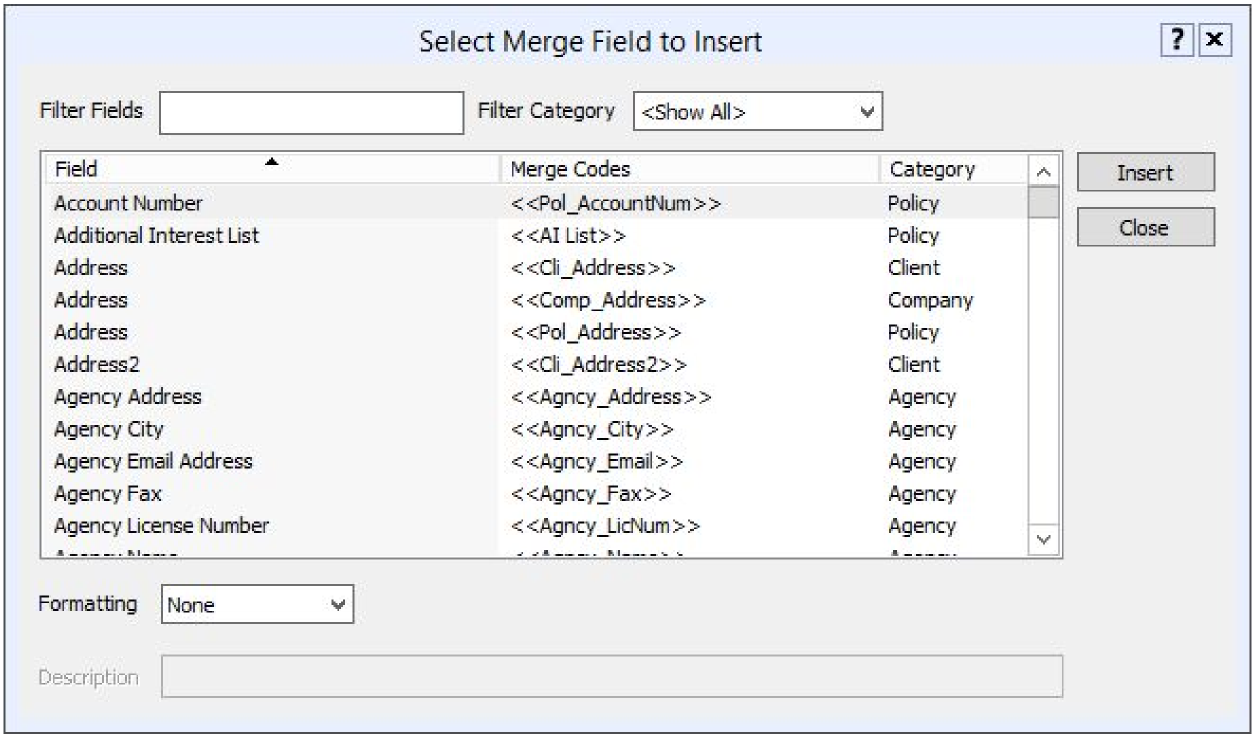


The "Edit Text Message Template" window will open



Enter the New Template Name, then enter the Message.

By clicking on "Insert Merge Field" the list of available merge fields will open.



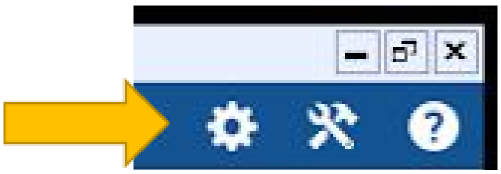
Select the Field you would like added to the message then click “Insert” one time.
Click “Close” and the Merged Field will now be in the letter.
*By adding the appropriate fields to the Text the information will pull directly from the client file into the letter.
Click the “Save” to save your template to the library.

***A list of recommended Text Templates can be found in the Sales Guide or by reaching out to your APP trainer.**

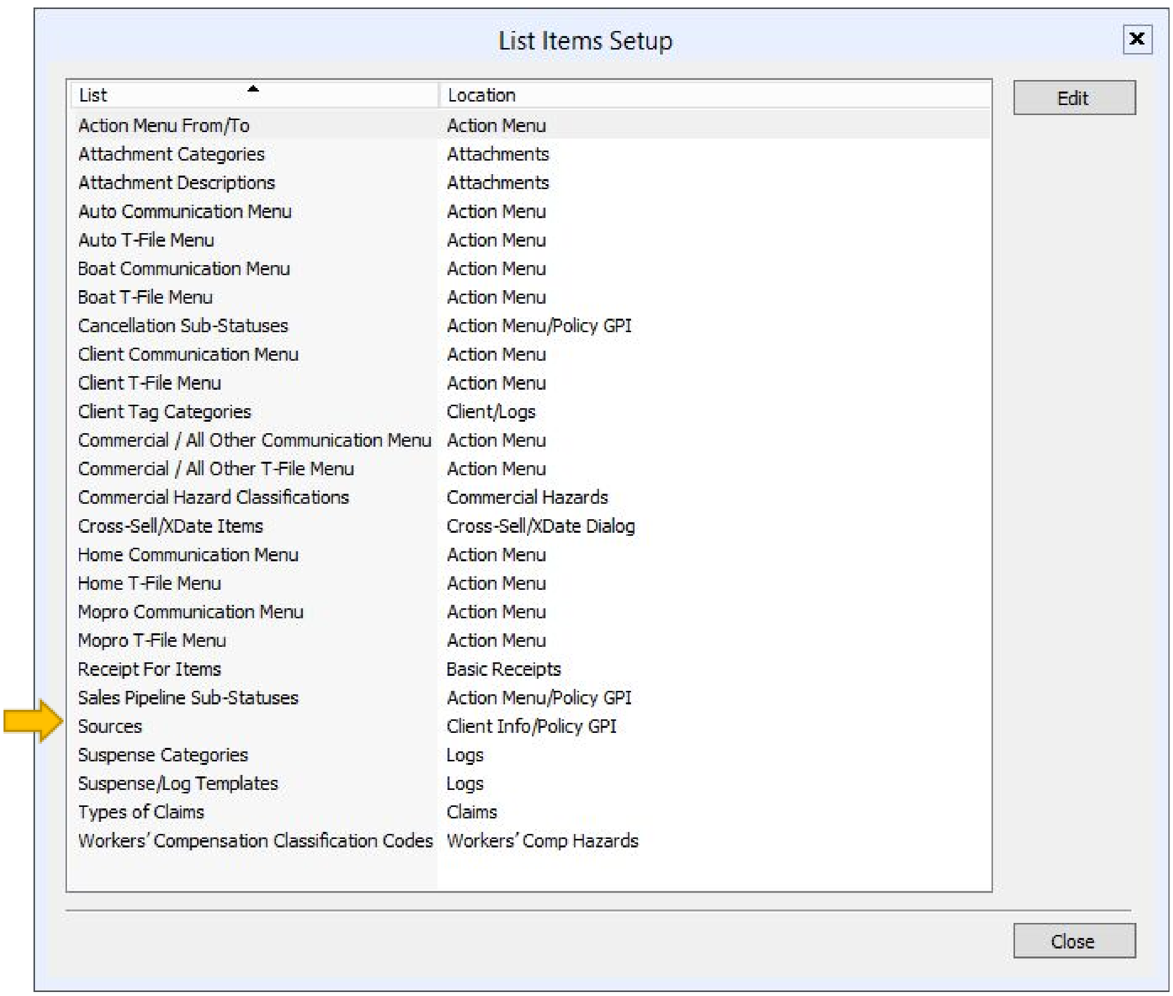
Customizing Lists

Updating Source Codes

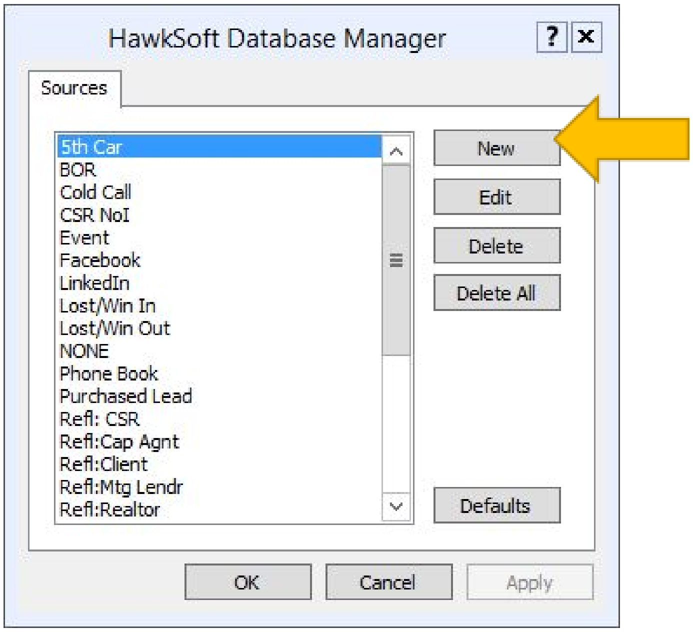
Click on the Cog in the upper right hand screen, then select “Customize Lists”



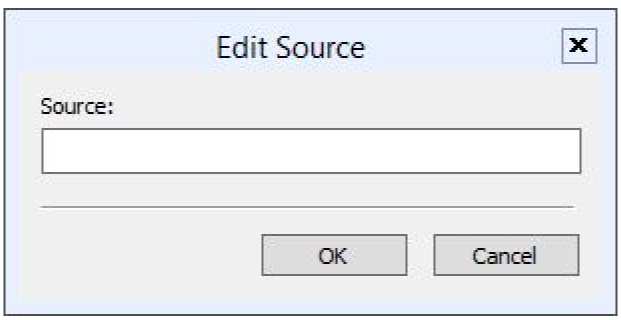
A new screen will open. You will need to Click on “Sources”



In the sub-menu click “New”



The “Edit Source” window will open



Add the Items listed in the “Source Codes” document one at a time making sure to click “OK” after each one.

***A list of recommended Source Codes can be found below. You may also wish to customize this list to better fit your agency’s needs. If you need additional assistance in customizing this list please reach out to www.divaofinsurance.com or your APP trainer.**

Source Codes List

Source Definition: For all new prospects and policies entered into HawkSoft it is imperative to ASK and DOCUMENT the way that the lead was sourced. For Prospects this will be documented at the client and policy level. For Existing customers this will be documented only at the policy level.

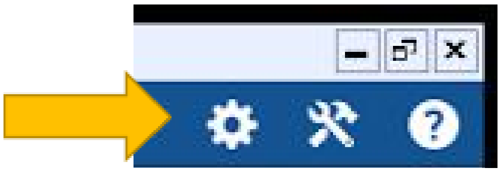
HawkSoft Source	Complete Source Name	Definiti on
5th Car Policy	5th Car	5th car policy
AR Cross Sell	Account Review Cross Sell	A Cross Sold policy from an account review.
AR Rewrite	Account Review Rewrite	A rewrite that is from an account review
BOR	Agent of Record	Agent of Record/Brokered (eff sold date)
CAP -	Captive Agent	Referral from a captive agent.
Carrier Assigned	Carrier Assigned	A policy that was written by the carrier and/or assigned to the agency for service
Carrier Refer	Carrier Referral	A referral from a Carrier
Client	Client Referral	Any referrals you receive from existing or former clients.
Cold Call	Cold Call	Reaching out to proactively to a prospect to see if they would be interested in a quote.
Community Even	Community Event	Trade Shows, Chamber Events, etc.
Cross In **Cross Out**	Cross Sell In – Customer Calls IN Cross Sell Out – Agent Calls OUT	A Cross Sell is when you add an additional line of business to an EXISTING client Use IN for client calling in for new quote. Use Out for agent calling client proactively.
Employee	Referral from Employee of office	Friends, Family, Contacts of Employee
Facebook	Facebook	Leads from Facebook

Google	Google	A prospect that found us on google
Ind-	Independent Agent	Referral from an independent agent
Internet Lead	Internet Lead	A prospect that found us online other than Google, a Carriers Site or our Website.
LinkedIn	LinkedIn	Leads from LinkedIn
Lost Soul In Lost Soul Out	Lost Soul Call In Lost Soul Call Out	A Lost or Win Back is when a policy or client leaves the agency either by canceling or lapse 90 or more days in the past. Use IN for client calling in for new quote. Use Out for agent calling client proactively.
MTG-	Mortgage/Lender	Referral from a Mortgage Relationship
Networking	Networking Event/Group	Referral from a networking group or event
Newspaper	Newspaper	A prospect that found us in the newspaper
NONE	No Source	Contact Manager before using this code.
Purchased Lead	Purchased Lead	A list that has been purchased or procured for new business purposes.
Replacement Home	Replacement Home	A new home policy for a client that is selling current home.
Rewrite In Rewrite Out	Rewrite Call In Rewrite Call Out	A rewrite is when a policy lapses or cancels and is requoted/rewritten less than 90 days of the cancel/lapse date Use IN for client calling in for new quote. Use Out for agent calling client proactively.
RLT-	Realtor	Any referrals from Realtor relationships
Spin-Off	Spin-Off	A Spin-off quote/policy is when splitting households in the case of a divorce or a child leaving home and purchasing their own policies.

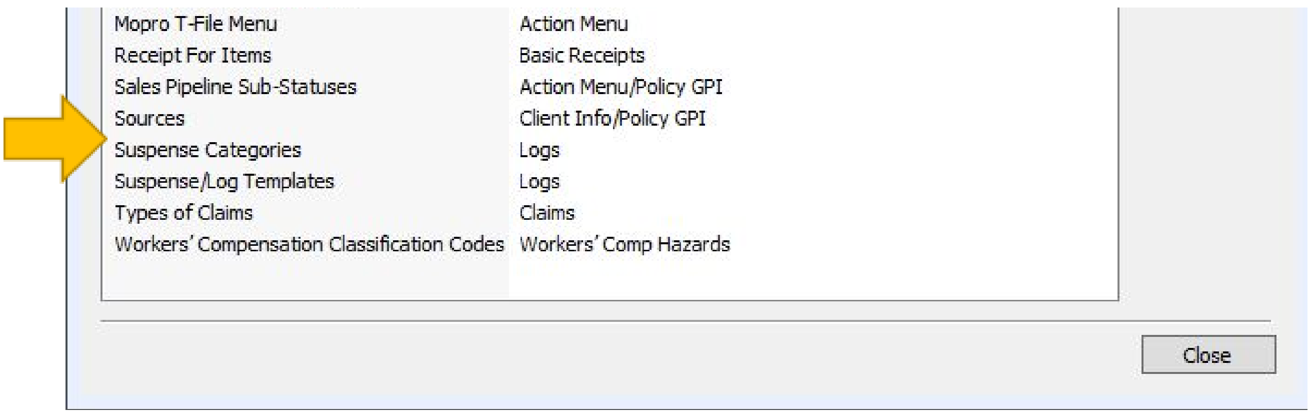
Walk-in	Walk-in	When the client says they just saw your building, sign, etc. and does not indicate any other referral source
Web	Web Lead from our website	Website form "Get a Quote" or the client indicates they were on our website
Web:Carrier	Carrier Websites	Quotes received from any company website.
Yelp	Yelp	Found our office on Yelp
YouTube	YouTube	Found us on YouTube

Updating Suspense Categories

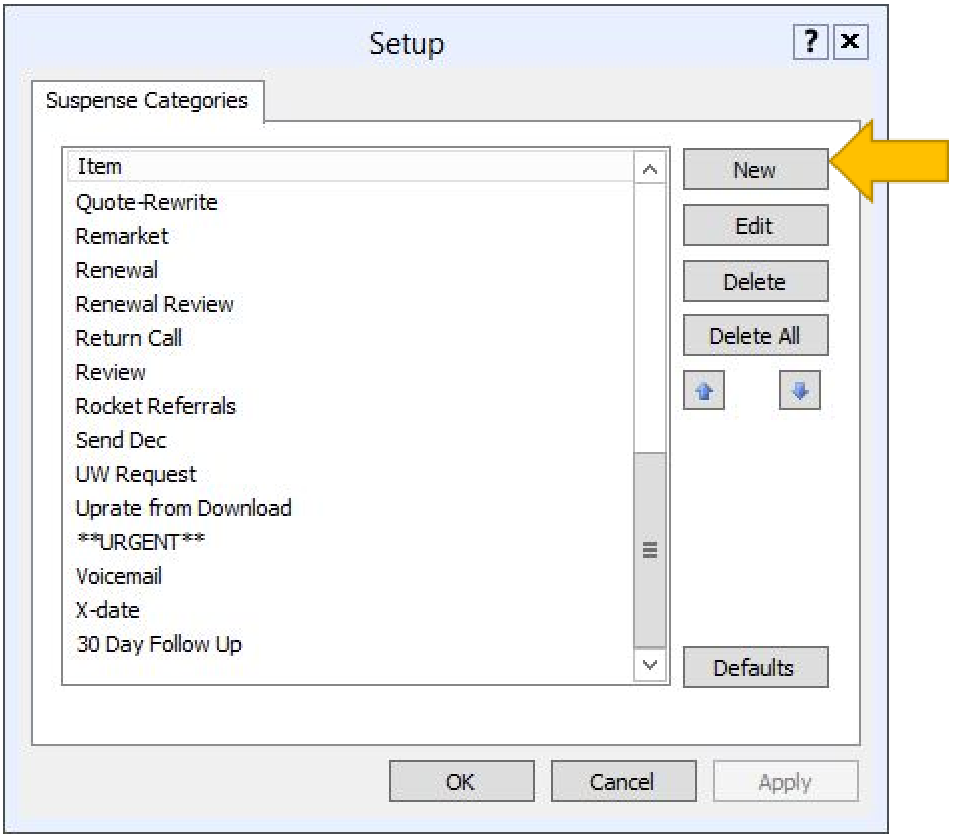
Click on the Cog in the upper right hand home screen, then select “Customize Lists”



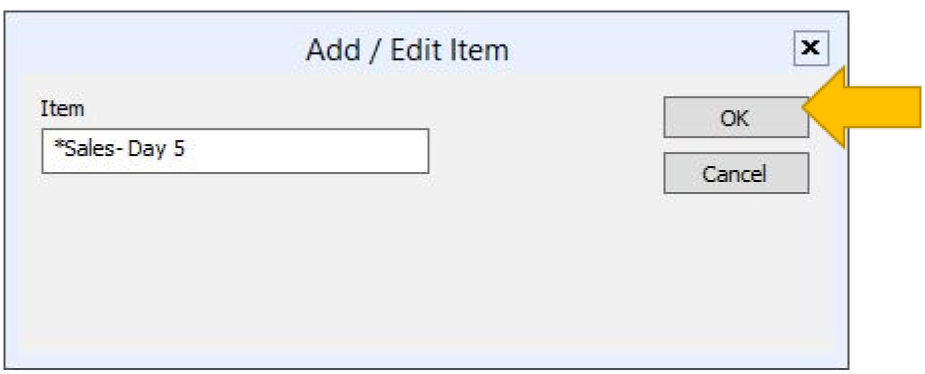
A new screen will open. You will need to select “Suspense Categories” under “List”



The “Setup” window will open

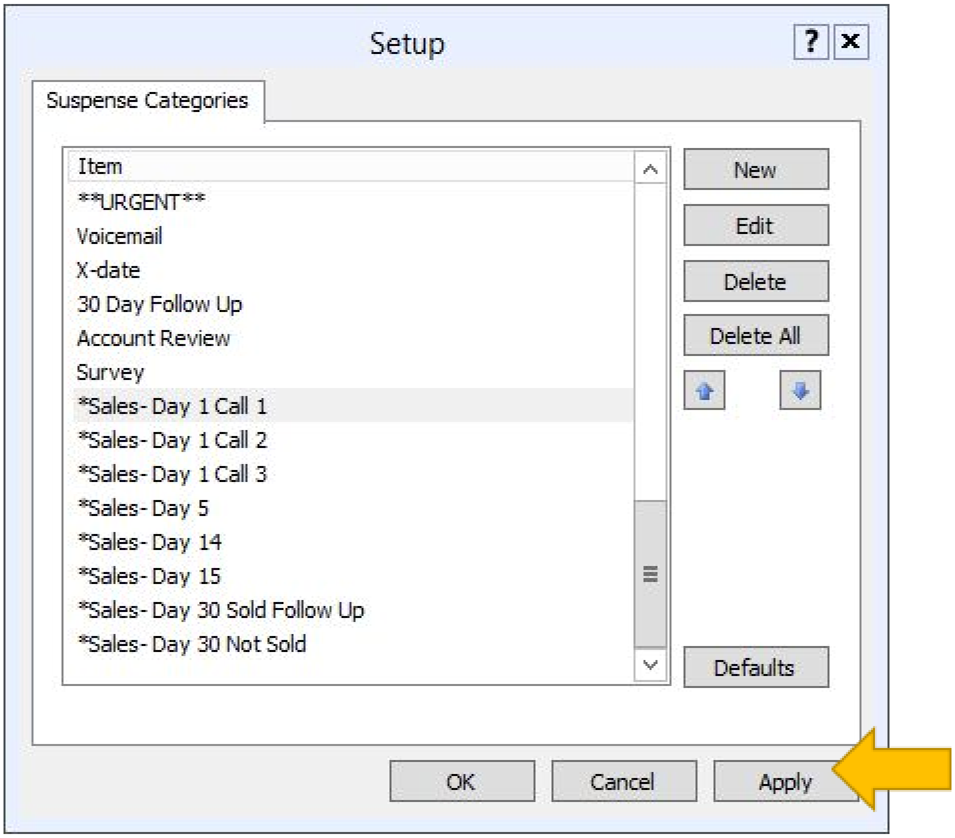


Click “New” and another window will open



Enter each item clicking “OK” then “New” until all have been entered

Once all items have been entered click on “Apply”



***A list of recommended Suspense Categories can be found below. It is not recommended to customize this list.**

Suspense Categories List

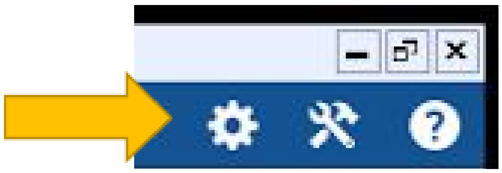
Suspense Categories: Used for each stage of the sales process (similar to the Status) to know at a glance what the next follow up action is needed in the Suspense Reports.

Suspense Category	Reason to Use
***Sales- Day 1 Call 1**	Prospect has reached out for a quote through email, online or voicemail. Insert the Client or Line of Business using “Prospect- Day 1 Call1 as the Status and set a suspense to the appropriate person as a priority 1 using the suspense category “Sales- Day 1 Call1” This category is a TOP PRIORITY to reach out to. This category means that the Prospect has not yet spoke with an agent to give information needed to provide a quote yet. If no contact is made create new log by updating the Status to Prospect- Day 1 Call 2 and suspend for the same day using Suspense Category *Sales- Day 1 Call 2
***Sales- Day 1 Call 2**	Second Attempt to make contact with prospect in the first day. If no contact is made create new log by updating the Status to Prospect-Day 1 Call 3 and suspend for the same day using Suspense Category *Sales- Day 1 Call 3
***Sales- Day 1 Call 3**	Last Attempt during the first day to make attempt to make contact with prospect. If no contact is made create new log by updating the Status to Prospect-Day 2 and suspend for the next day using Suspense Category *Sales- Day 2
***Sales- Day 2**	For any *Sales- Day 2 suspense that was not solved create a new log by updating the Status to Prospect-Day 4 and suspend for the suspend for 2 days in the future Suspense Category *Sales- Day 4
***Sales- Day 4**	For any *Sales- Day 4 suspense that was not solved create a new log by updating the Status to Prospect-Day 4 and suspend for the suspend for 2 days in the future Suspense Category *Sales- Day 6

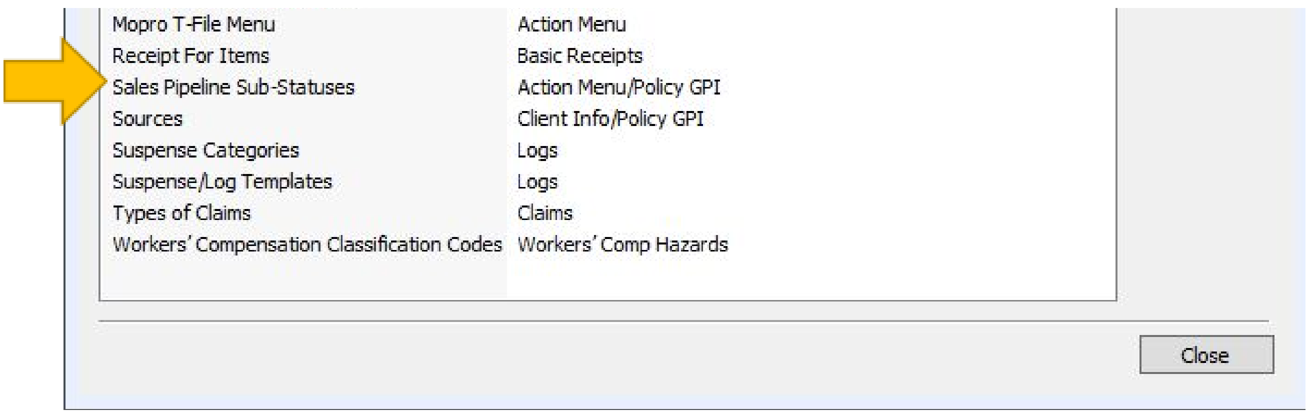
***Sales- Day 6**	For any *Sales- Day 6 suspense that was not solved create a new log by updating the Status to Prospect-Day 4 and suspend for the suspend for 2 days in the future Suspense Category *Sales- Day 8
***Sales- Day 8**	For any *Sales- Day 8 suspense that was not solved create a new log by updating the Status to Prospect-Day 10 –Break Up and suspend for 2 days in the future using Suspense Category *Sales- Day 10 -Break Up
***Sales- Day 10 -Break up**	For any Sales- Day 10 suspense where the client was never reached to get the information to quote the next step is the "Break Up". Send "Break Up" message by creating a new log then update status to Prospect- No Response. For any *Sales- Day 10 suspense where the client was provided with and quote but never responded to quote the next step is the "Break Up". Send "Break Up" message by creating a new log then update status to Refused- No Response.
Quote- New Business	If the information is received but the quote cannot be completed over the phone suspend for the same day as Quote- New Business. Remember we need to return the quote within 24 hours.
Quote- Rewrite	If an existing client has a policy that needs to be rewritten and the quote cannot be completed over the phone suspend for the same day as Quote-Rewrite. Remember we need to return the quote within 24 hours.
***Sales- Day 15 Issued**	*Sales- Day 15 is the first time to check in after a policy has been issued. You will then set a suspense for 14 more days in the future using the Suspense Category *Sales- Day 30 Issued
***Sales- Day 30 Issued**	Once a policy has been issued you need to set a 30 day follow up to make sure the client is satisfied with service, coverage, etc.

Updating Sales Pipeline Sub-Statuses

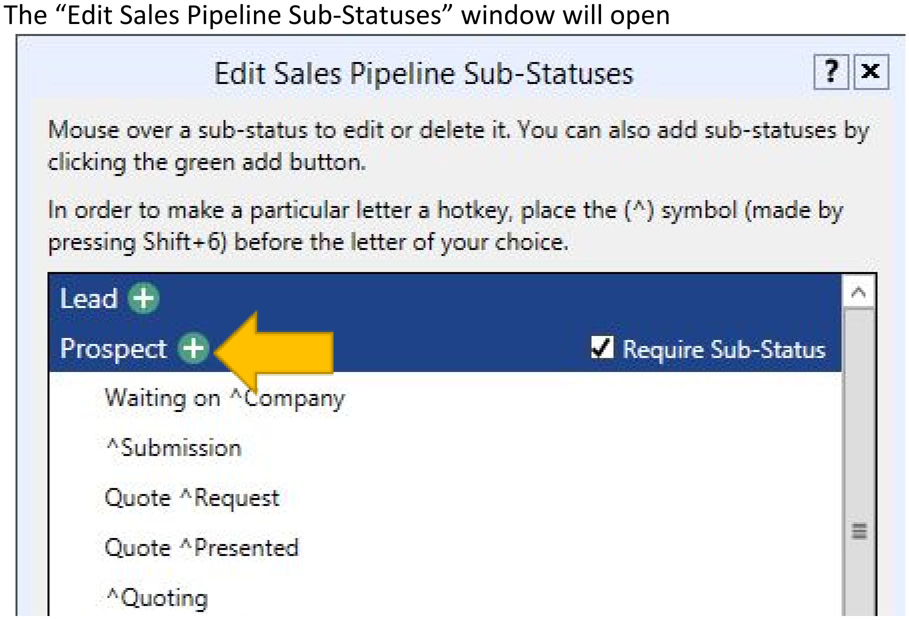
Click on the Cog in the upper right hand home screen, then select "Customize Lists"

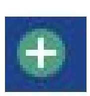


A new screen will open. You will need to select "Sales Pipeline Sub-Statuses" under "List"



The "Edit Sales Pipeline Sub-Statuses" window will open



Click the Green  then enter a sub-status into the box 

You will also need to click on the “Require Sub-Status” Box 

before exiting.

***A list of recommended Sales Pipeline Sub-Statuses can be found below. It is not recommended to customize this list.**

Sales Pipeline Sub-Status List

All new prospects are entered into HawkSoft as they arrive NOT as they are quoted.

We will be tracking the closing ratios and follow up process in HawkSoft by using policy statuses and effective dates. As your lead progresses you will need to keep your policy statuses updated for reporting. Here are the definitions of the statuses:

Client Status	Definition
Lead	A person that has not requested a quote (purchased leads, employee's contacts, trade show list, etc.)
Prospect	A person that has requested a quote
Active	A Client with at least 1 Active policy
Dead	A Prior Client that no longer has any Active policies with the agency.
Policy Status	**Definition**
Lead	No communication has been made with person (purchased leads, employee's contacts, trade show list, etc.)
Prospect- Day 1 Call 1	URGENT! Contacted office through email, web, voicemail, etc.
Prospect- Day 1 Call 2	Second attempt, in the first day, to connect with the prospect.
Prospect- Day 1 Call 3	Third attempt, in the first day, to connect with the prospect.
Prospect- Day 2	Second attempt needs to be made to connect with the prospect.
Prospect- Day 4	Third attempt needs to be made to connect with the prospect.
Prospect- Day 6	Fourth attempt needs to be made to connect with the prospect.
Prospect- Day 8	Fifth attempt needs to be made to connect with the prospect.

Prospect- Day 10 -Break Up	Final attempt needs to be made to connect with the prospect. Break Up notice needs to be send out. If unsuccessful in connecting with prospect update status to Prospect- No Response
Prospect-No Response	We were unsuccessful in connecting with the prospect to get the information needed to quote and have placed our 6 follow up calls.
Prospect – Waiting on Client	You are waiting on client for additional information to finish the quotes (not used for a client that has quote and has not made a decision)
Prospect –Waiting on Co.	Application has been submitted to carrier and agent is waiting for the quote to be returned
Prospect – Quote Request	Someone has requested a quote by phone or walk in and you are actively talking to them.
Prospect – Quoting	We have the information and the quote is in process to be created as it could not be completed over the phone.
Prospect – Quote Presented	We have connected with the client and delivered the quote and are waiting on a final decision
Refused- Price Not Comp.	When we aren't close to their current pricing
Refused- Didn't Buy Risk	Use this when they don't move forward with a purchase (car, home, etc.)
Refused- Like Agent/Co	They looked but wanted to stay with the current Company or Agent.
Refused-No Response	We spoke with the prospect and provided a quote but have received a response after our 6 follow ups over 2 weeks.
Refused-Not Good Fit	Based on agency standards the prospect is not a good fit
Refused-State Min	The client has state minimums and is unwilling to improve coverage
Refused-Other	Used for one off situations
Rejected- U/W	The risk was rejected by underwriting
Rejected- Agency Disqualified	Based on insurance history the client is not qualified

The “Refused” statuses are only used for lines of business that have been quoted.

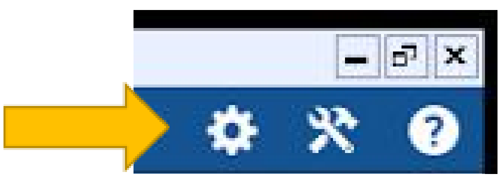
If the line of business was never quoted it will stay in one of the “Prospect” statuses.

User Permissions

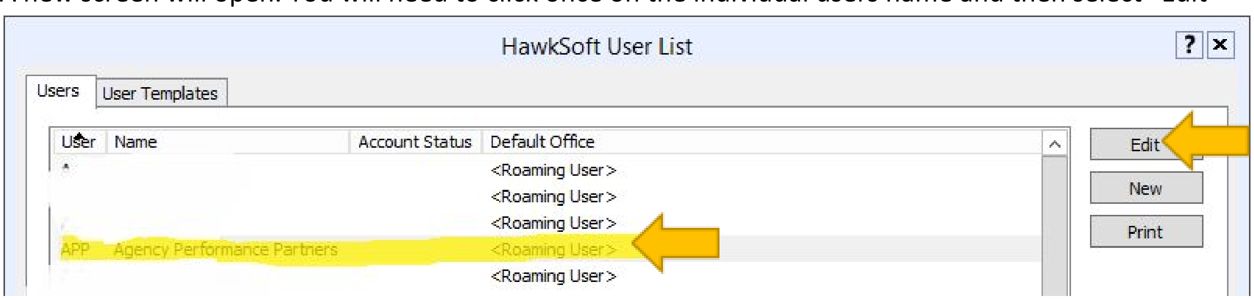
As a manager you will be using several reports to check on progress, compliance, performance and production. Some agencies also want key members of their staff, or all staff, to be able to run these reports as well. As with any setting in HawkSoft it is important to review your agencies policies and procedures before allowing access to any additional information in HawkSoft. This guide below will show you how to give access to different report types to the individual users in your agency. If you need additional assistance with understanding the pros and cons of each type of report you should reach out to your APP trainer, www.divaofinsurace.com or HawkSoft support.

Updating Individual User Permissions

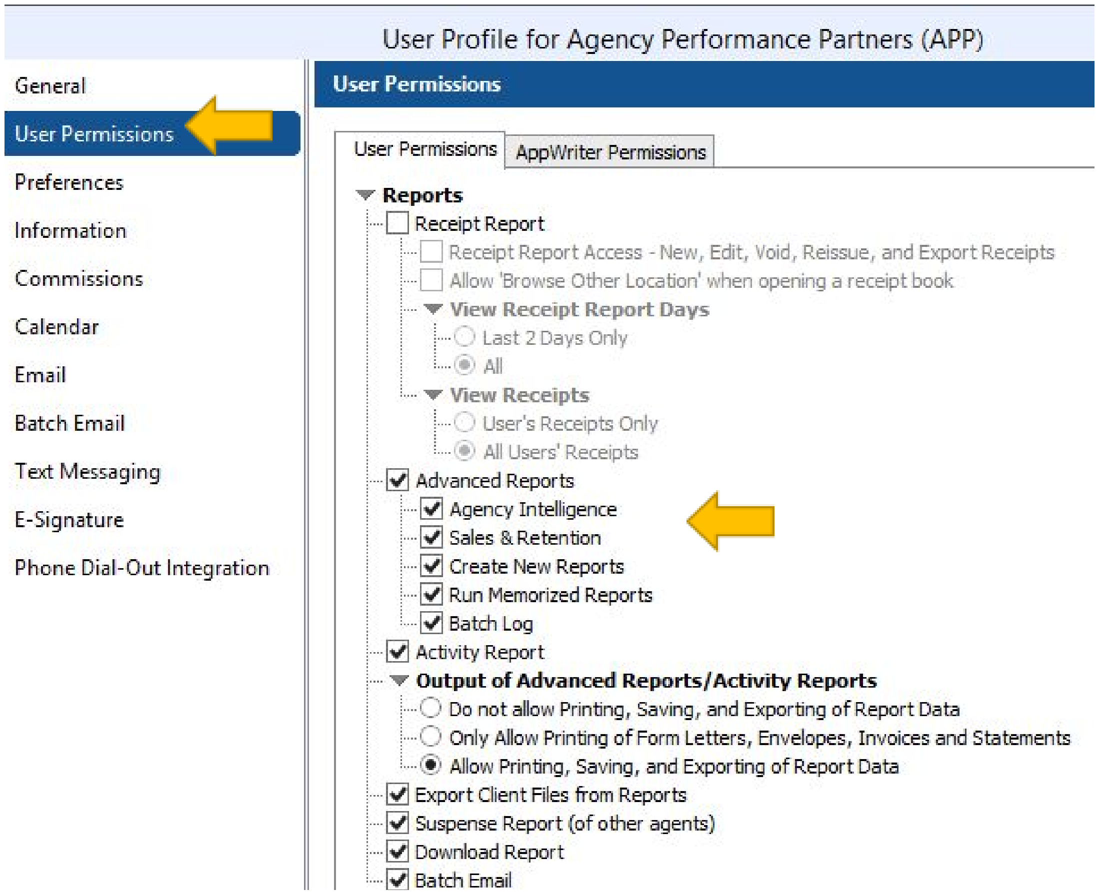
Click on the Cog in the upper right hand screen, then select “User List”



A new screen will open. You will need to click once on the individual users name and then select “Edit”



A new window will open, Select “User Permissions” then scroll to “Reports”

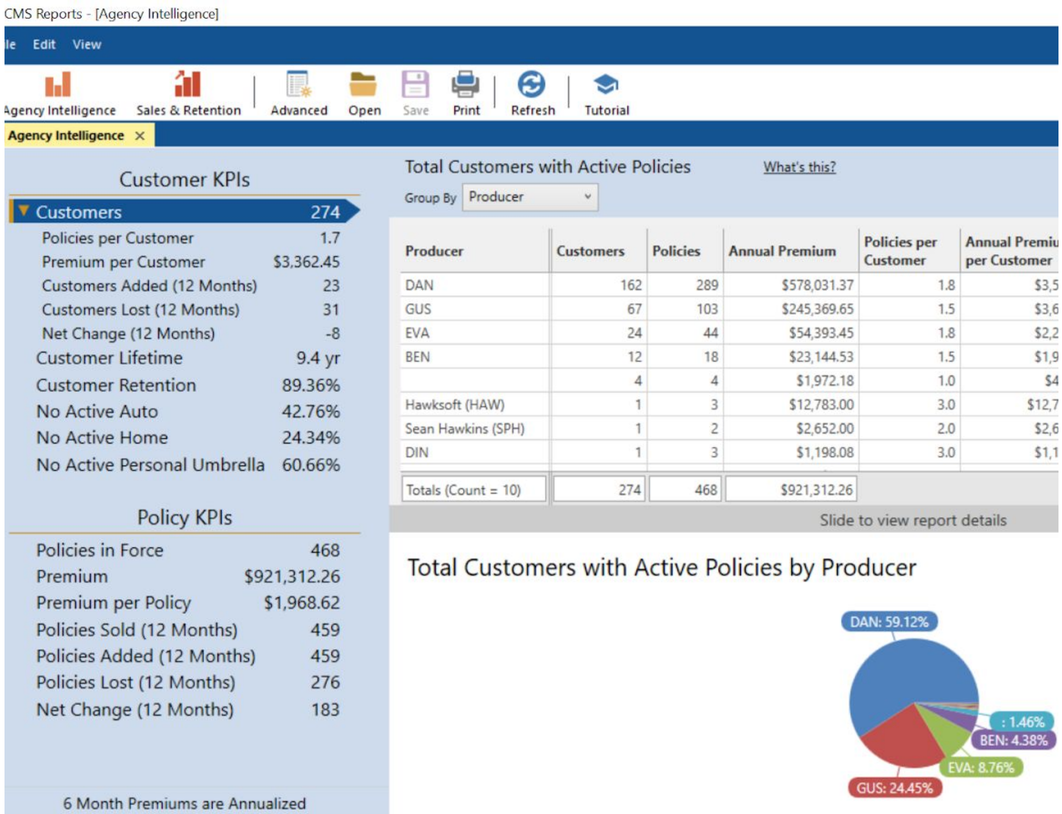


You will then need to select the reports that you want the individual user to have access to. Great care should be used when selecting which reports you want each person to have access to.

Report Types

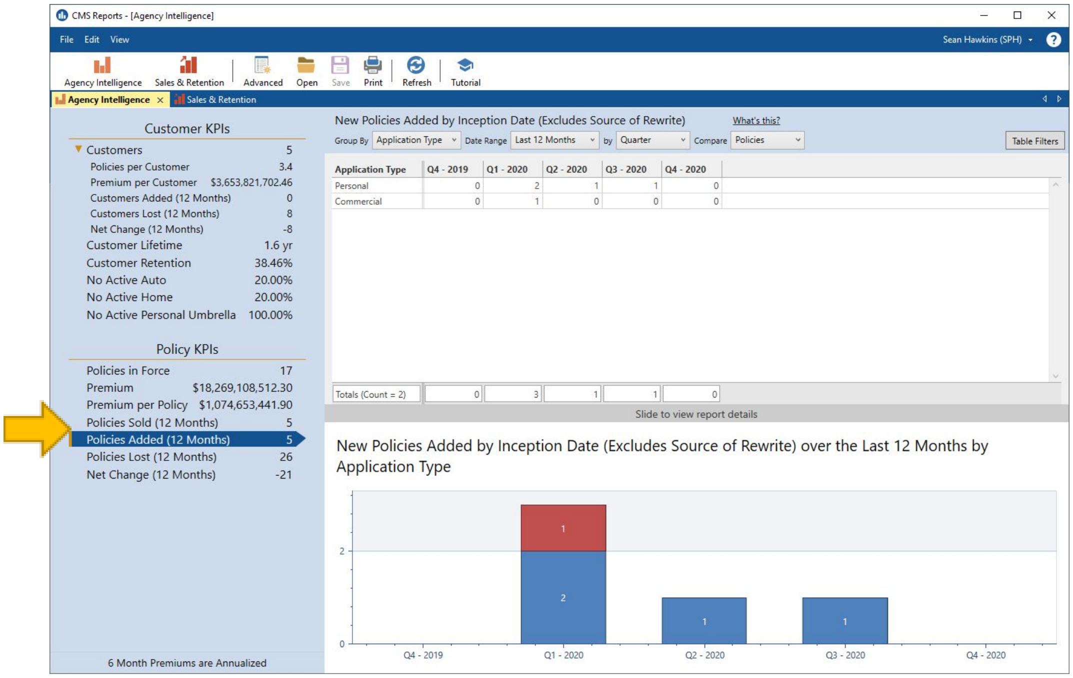
This section will highlight various types of reports available to you in HawkSoft

Agency Intelligence Report



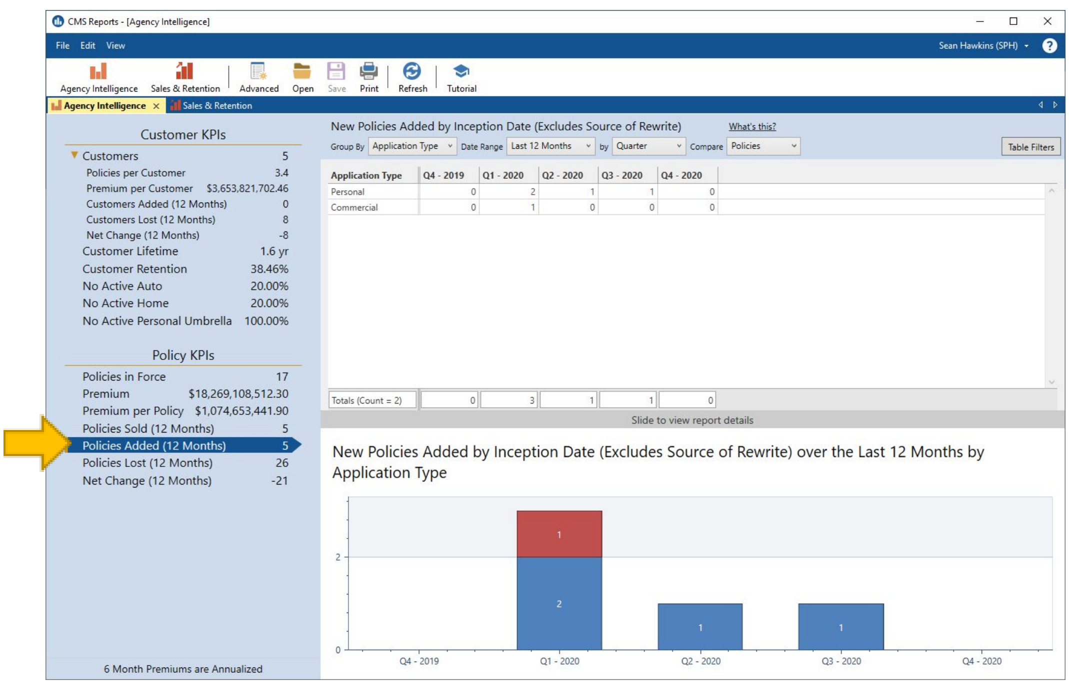
- **Agency Intelligence provides access to several predefined reports which track Key Performance Indicators (KPIs).**
- **These KPIs are based on your agency's "book of business" (customer and policy data that currently exists in CMS).**
- **The data is displayed in a table, as well as in pie and bar charts where applicable, making it easy for you to measure and evaluate your agency's overall performance.**

<u>Agency Intelligence Policies Added</u>



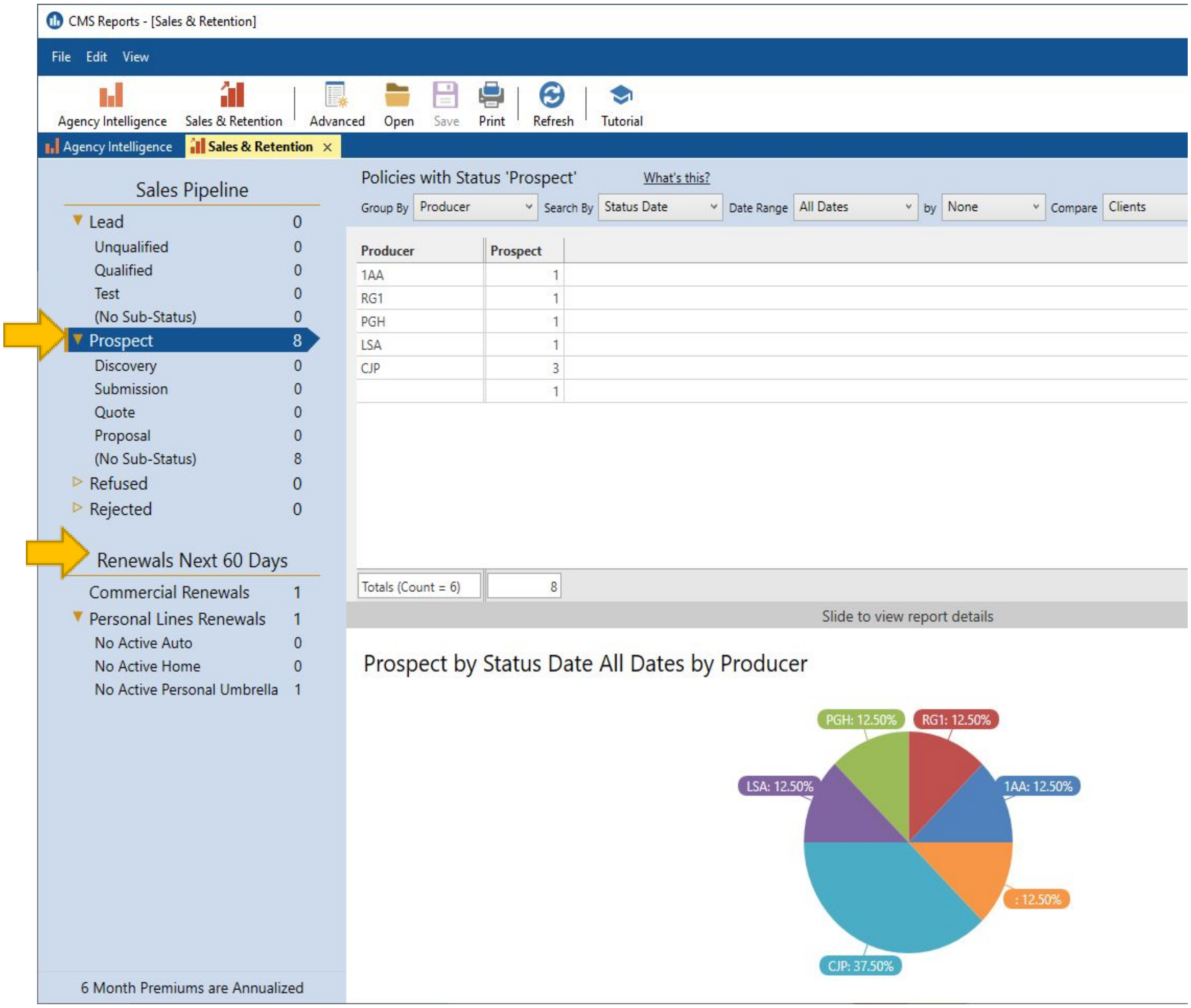
NOTE: Policies with the Source set to Rewrite are excluded from this report. Rewrite is used to indicate that the coverage was rewritten to another carrier and is not a "new" policy.

<u>Agency Intelligence Policies Lost</u>



NOTE: Policies with the status of Replaced are excluded from this report. This status is used to indicate that the coverage was rewritten to another policy (not "lost").

Sales and Retention Report



Sales and Retention provides access to several predefined reports which include sales pipeline and renewal data.

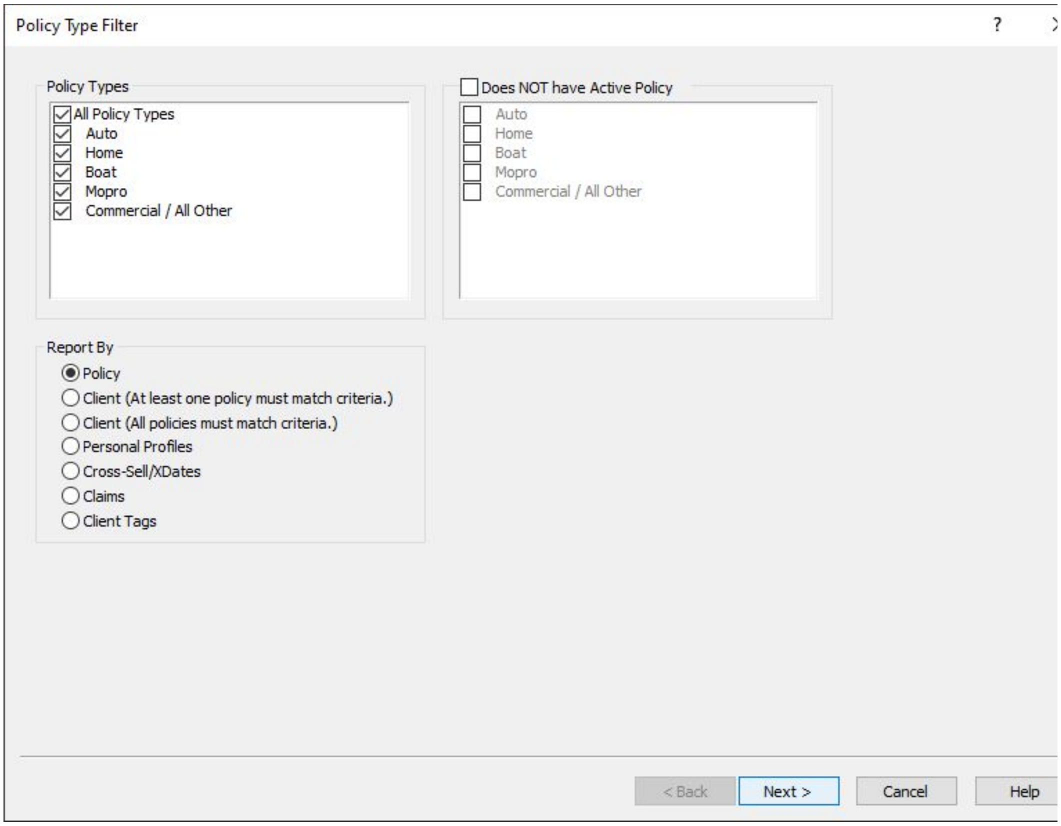
These metrics are based on your agency's customer and policy data that currently exists in CMS.

Common Reports

- **Prospect Pipeline**
- **Sales Pipeline Sub-status**
- **Renewals Next X Days**

***6 Month Premiums are Annualized**

Advanced Reports



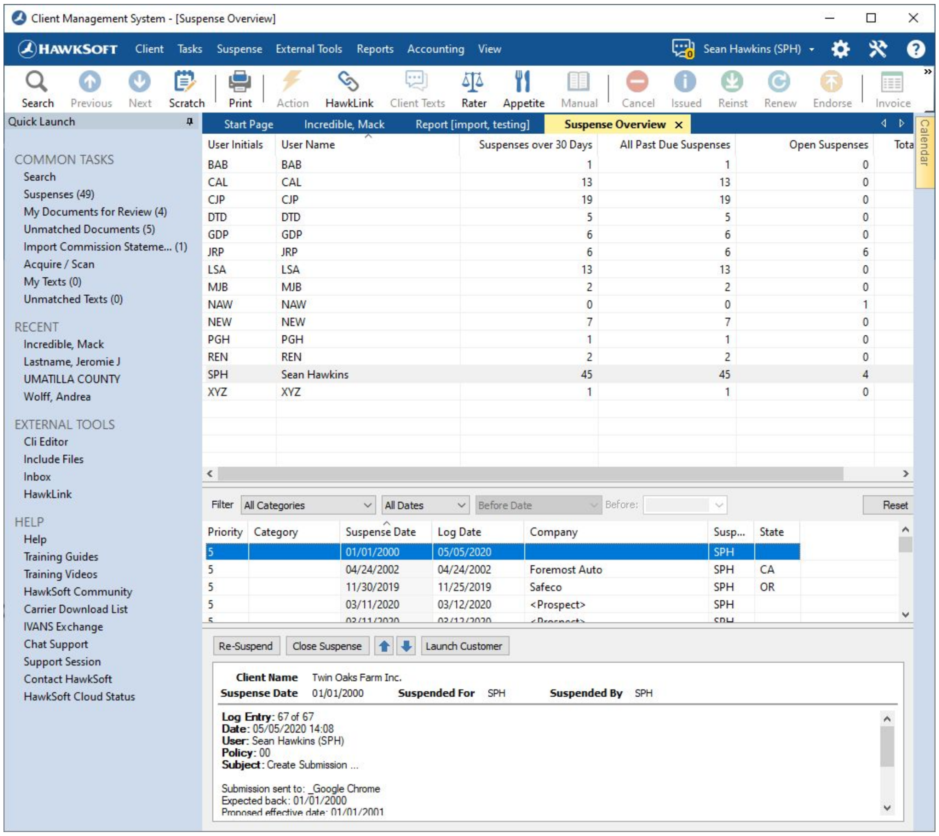
The HawkSoft CMS Advanced Reports enables you to run customized reports that include any combination of client, policy, claims, and marketing information from data stored in CMS client files.

- **Create and store customized reports**
- **Filter and summarize the data**
- **Use generated reports as the basis for batch emails and form letters**

Common Advanced Reports:

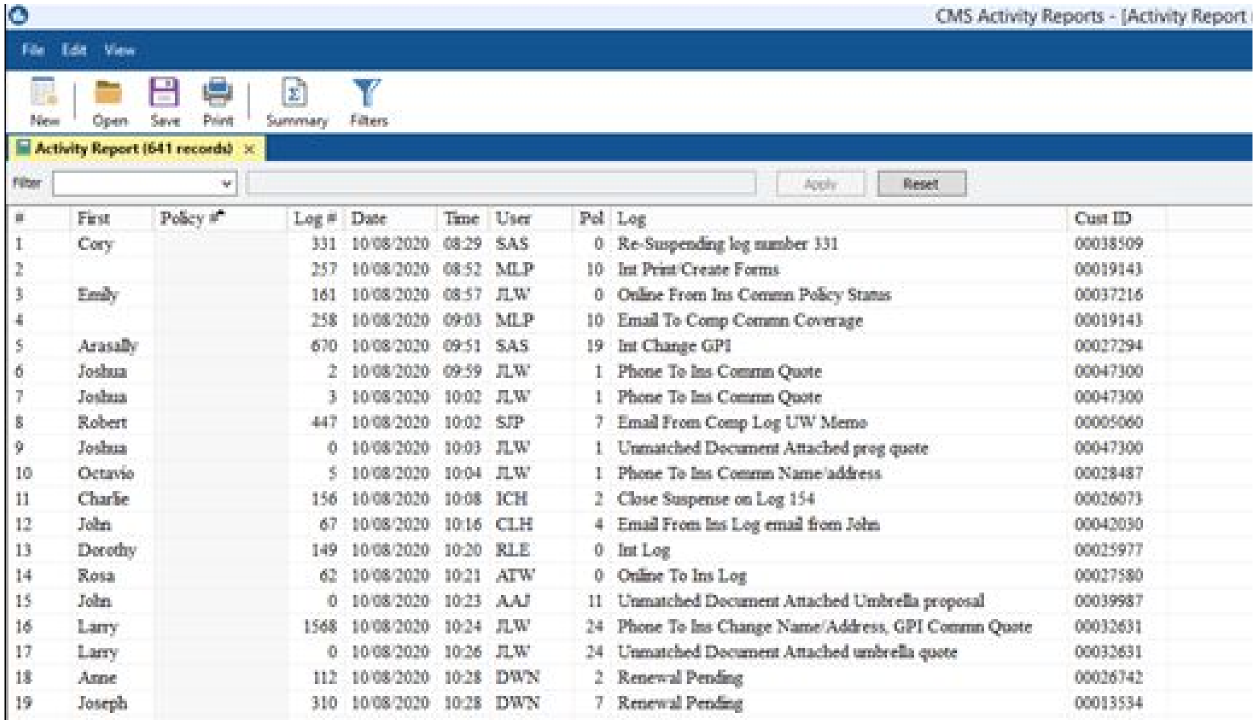
Renewal Report (Expiration Report)
Current Active Clients Report
Cancelled Policies Report
Cancel Pending Report
Policies by Company Report (Book of Business)
Production Report (Inception Date)
Birthday Report
XDate Report
Claims Report
Cross Sell Report

Suspense Report



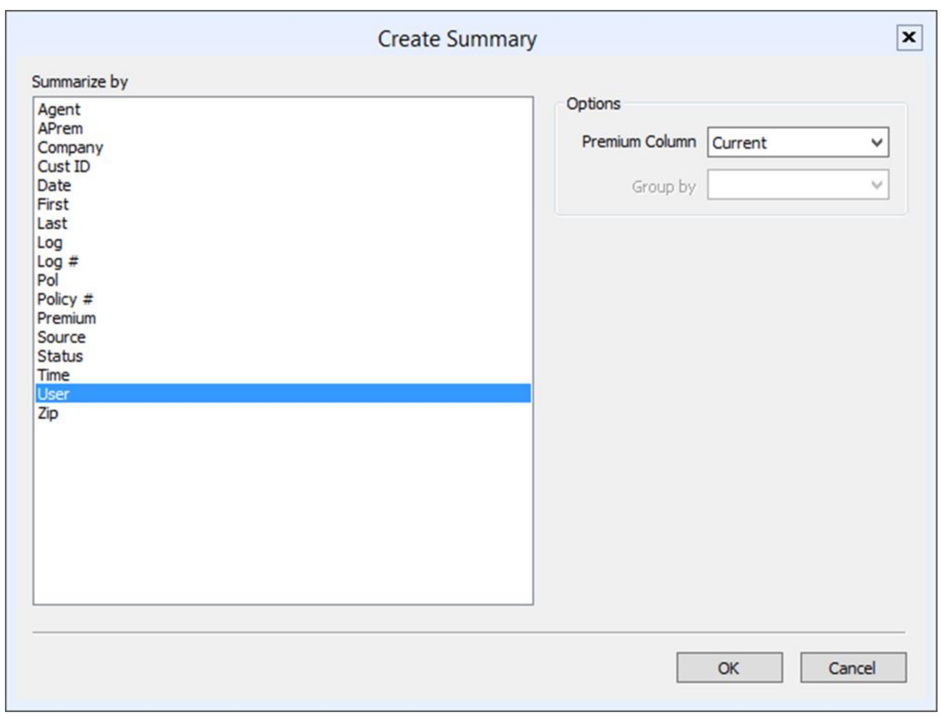
Summary of the Suspenses for all users, and a detailed list of Suspenses for each user. Often used to manage workflow and accountability.

Activity Report



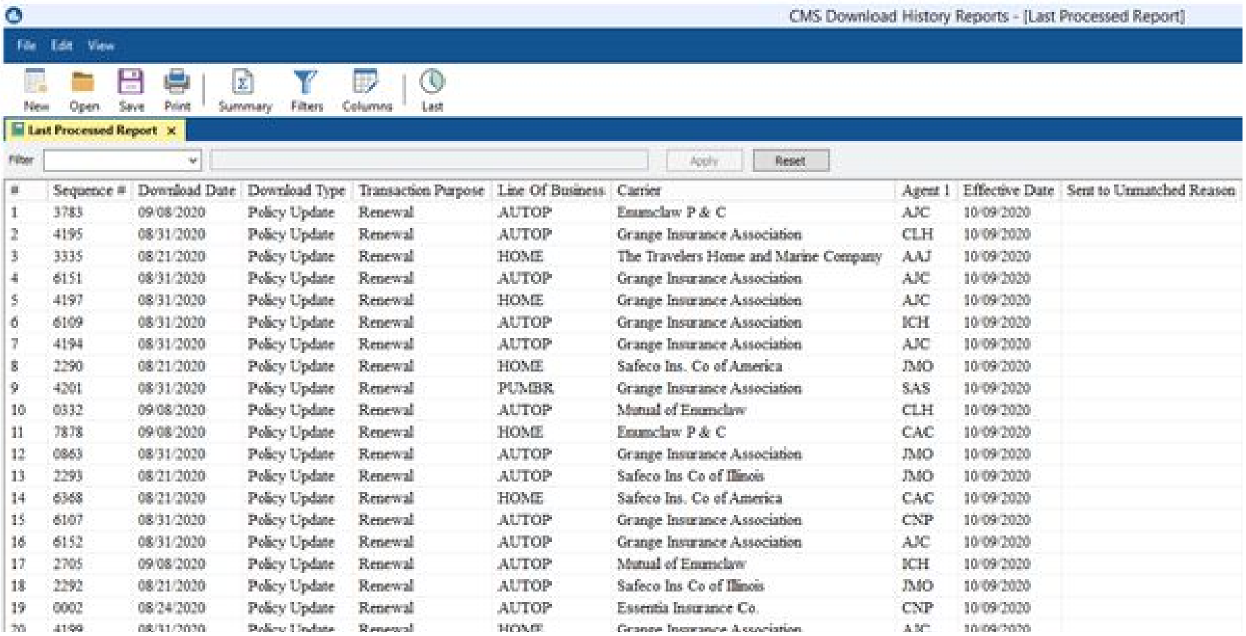
#	First	Policy #	Log #	Date	Time	User	Pol	Log	Cust ID
1	Cory		331	10/08/2020	08:29	SAS	0	Re-Suspending log number 331	00038509
2			257	10/08/2020	08:52	MLP	10	Int Print/Create Forms	00019143
3	Emily		161	10/08/2020	08:57	JLW	0	Online From Ins Comm Policy Status	00037216
4			258	10/08/2020	09:03	MLP	10	Email To Comp Comm Coverage	00019143
5	Arasally		670	10/08/2020	09:51	SAS	19	Int Change GPI	00027294
6	Joshua		2	10/08/2020	09:59	JLW	1	Phone To Ins Comm Quote	00047300
7	Joshua		3	10/08/2020	10:02	JLW	1	Phone To Ins Comm Quote	00047300
8	Robert		447	10/08/2020	10:02	SJP	7	Email From Comp Log UW Memo	00005060
9	Joshua		0	10/08/2020	10:03	JLW	1	Unmatched Document Attached prog quote	00047300
10	Octavio		5	10/08/2020	10:04	JLW	1	Phone To Ins Comm Name/address	00028487
11	Charlie		156	10/08/2020	10:08	ICH	2	Close Suspense on Log 154	00026073
12	John		67	10/08/2020	10:16	CLH	4	Email From Ins Log email from John	00042030
13	Dorothy		149	10/08/2020	10:20	RLE	0	Int Log	00025977
14	Rosa		62	10/08/2020	10:21	ATW	0	Online To Ins Log	00027580
15	John		0	10/08/2020	10:23	AAJ	11	Unmatched Document Attached Umbrella proposal	00039987
16	Larry		1568	10/08/2020	10:24	JLW	24	Phone To Ins Change Name/Address, GPI Comm Quote	00032631
17	Larry		0	10/08/2020	10:26	JLW	24	Unmatched Document Attached umbrella quote	00032631
18	Anne		112	10/08/2020	10:28	DWN	2	Renewal Pending	00026742
19	Joseph		310	10/08/2020	10:28	DWN	7	Renewal Pending	00013534

The Activity for specified dates and users along with a detailed list of Activity Types (Log).



Using the "Summary" function you can batch together information by User, Log, Status, Source, Etc.

Download Report



#	Sequence #	Download Date	Download Type	Transaction Purpose	Line Of Business	Carrier	Agent 1	Effective Date	Sent to Unmatched Reason
1	3783	09/08/2020	Policy Update	Renewal	AUTOP	Enumclaw P & C	AJC	10/09/2020	
2	4195	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	CLH	10/09/2020	
3	3335	08/21/2020	Policy Update	Renewal	HOME	The Travelers Home and Marine Company	AAJ	10/09/2020	
4	6151	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	AJC	10/09/2020	
5	4197	08/31/2020	Policy Update	Renewal	HOME	Grange Insurance Association	AJC	10/09/2020	
6	6109	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	ICH	10/09/2020	
7	4194	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	AJC	10/09/2020	
8	2290	08/21/2020	Policy Update	Renewal	HOME	Safeco Ins. Co of America	JMO	10/09/2020	
9	4201	08/31/2020	Policy Update	Renewal	PUMBR	Grange Insurance Association	SAS	10/09/2020	
10	0332	09/08/2020	Policy Update	Renewal	AUTOP	Mutual of Enumclaw	CLH	10/09/2020	
11	7878	09/08/2020	Policy Update	Renewal	HOME	Enumclaw P & C	CAC	10/09/2020	
12	0863	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	JMO	10/09/2020	
13	2293	08/21/2020	Policy Update	Renewal	AUTOP	Safeco Ins Co of Illinois	JMO	10/09/2020	
14	6368	08/21/2020	Policy Update	Renewal	HOME	Safeco Ins. Co of America	CAC	10/09/2020	
15	6107	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	CNP	10/09/2020	
16	6152	08/31/2020	Policy Update	Renewal	AUTOP	Grange Insurance Association	AJC	10/09/2020	
17	2705	09/08/2020	Policy Update	Renewal	AUTOP	Mutual of Enumclaw	ICH	10/09/2020	
18	2292	08/21/2020	Policy Update	Renewal	AUTOP	Safeco Ins Co of Illinois	JMO	10/09/2020	
19	0002	08/24/2020	Policy Update	Renewal	AUTOP	Essentia Insurance Co.	CNP	10/09/2020	
20	4199	08/31/2020	Policy Update	Renewal	HOME	Grange Insurance Association	AJC	10/09/2020	

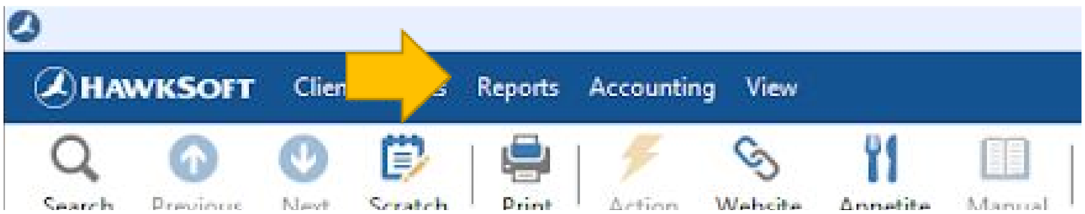
The Downloaded information from carriers into HawkSoft.

Custom Reports

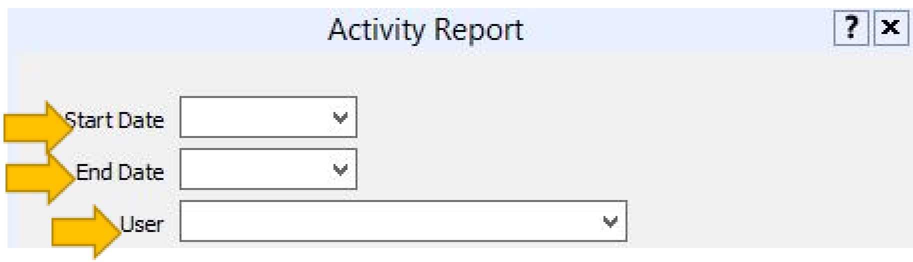
Setup New Prospect/ Source Report

To Setup the report for the first time:

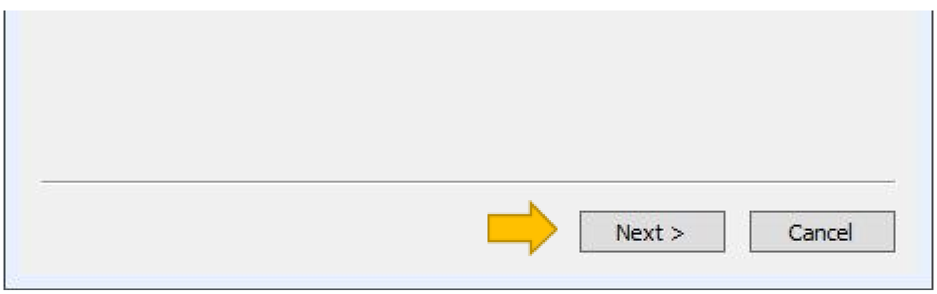
Select "Reports" then "Activity Reports"



"Activity Report" will open in a new window

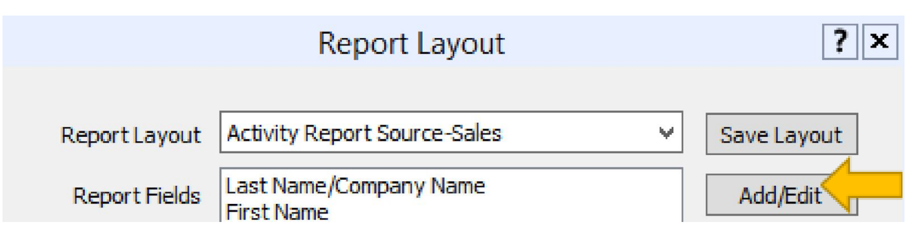


Fill in "Start Date" and "End Date"
Then select the appropriate User from the dropdown (or leave field blank to get all users activity)



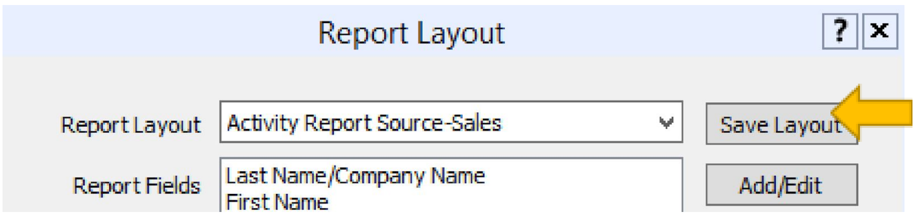
Click "Next"

On the "Report Layout" screen click "Add/Edit"



Add the following fields to the fields that were already there:
Client Producer
Agent
Client Source
Source

Click “Save Layout”

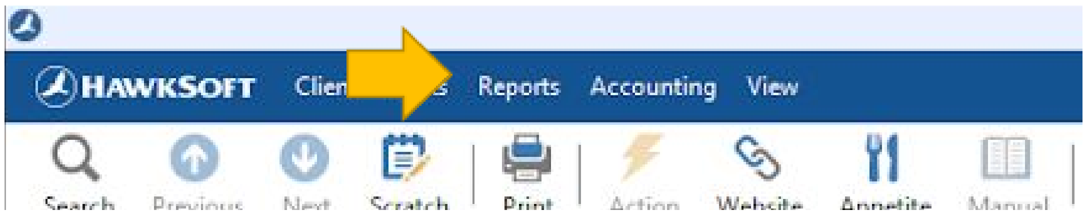


Enter the unique name “Activity Report Source-Sales” then click “OK”

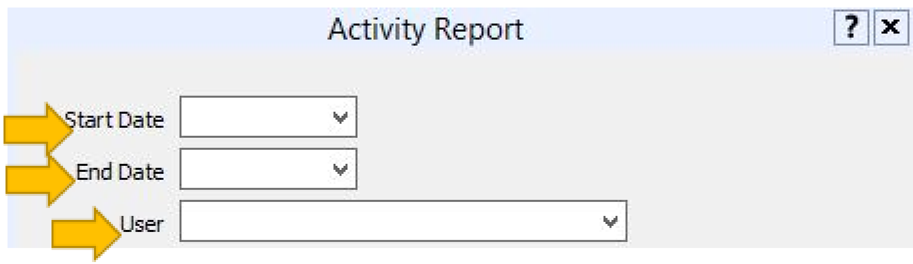
Running New Prospect/ Source Report

The purpose of the this report is to better understand what activities each agent has accomplished in the designated time period.

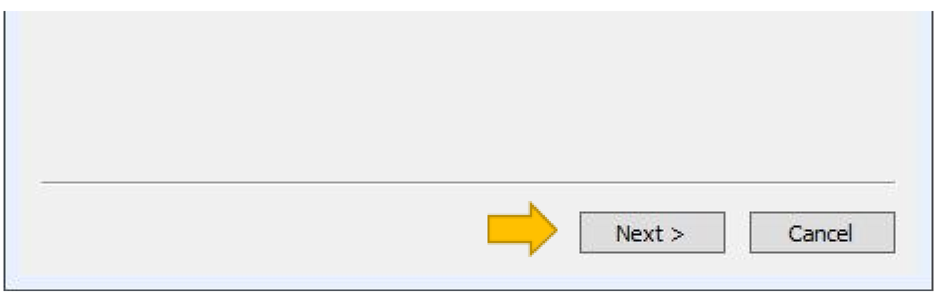
Select “Reports” then “Activity Reports”



“Activity Report” will open in a new window

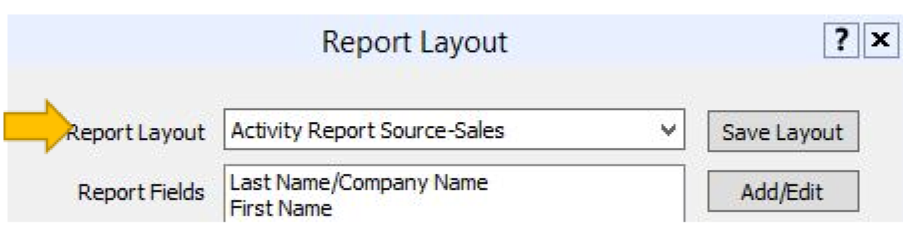


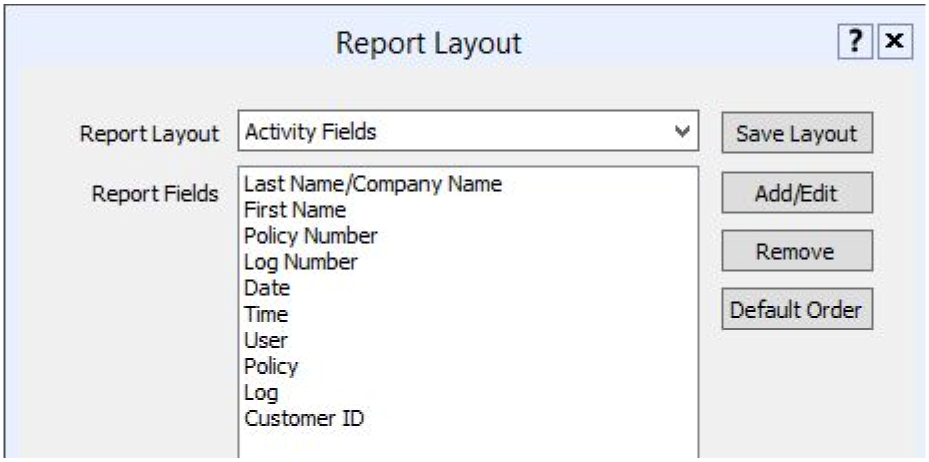
Fill in “Start Date” and “End Date”
Then select the appropriate User from the dropdown (or leave field blank to get all users activity)



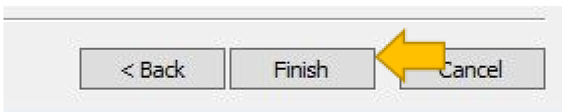
Click “Next”

In the dropdown next to “Report Layout” select “Activity Report Source-Sales”

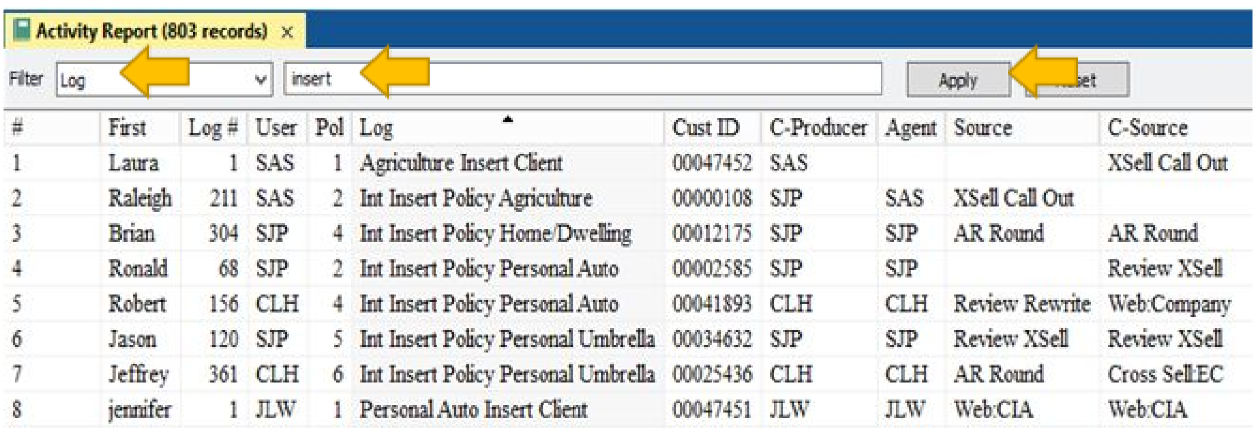




Click "Finish" and the report will run, then open



In the dropdown next to "Filter" select "Log"
In the empty box type "insert" and then click "Apply"



#	First	Log #	User	Pol	Log	Cust ID	C-Producer	Agent	Source	C-Source
1	Laura	1	SAS	1	Agriculture Insert Client	00047452	SAS			XSell Call Out
2	Raleigh	211	SAS	2	Int Insert Policy Agriculture	00000108	SJP	SAS	XSell Call Out	
3	Brian	304	SJP	4	Int Insert Policy Home/Dwelling	00012175	SJP	SJP	AR Round	AR Round
4	Ronald	68	SJP	2	Int Insert Policy Personal Auto	00002585	SJP	SJP		Review XSell
5	Robert	156	CLH	4	Int Insert Policy Personal Auto	00041893	CLH	CLH	Review Rewrite	Web:Company
6	Jason	120	SJP	5	Int Insert Policy Personal Umbrella	00034632	SJP	SJP	Review XSell	Review XSell
7	Jeffrey	361	CLH	6	Int Insert Policy Personal Umbrella	00025436	CLH	CLH	AR Round	Cross Sell:EC
8	jennifer	1	JLW	1	Personal Auto Insert Client	00047451	JLW	JLW	Web:CIA	Web:CIA

A new report will open with just the Clients/Policies inserted into HawkSoft within the date range specified.

With this report you can also verify that the Producer, Agent, Source and Client Source have been completed.

Any log with "Insert Client" is a new client file being entered into the system

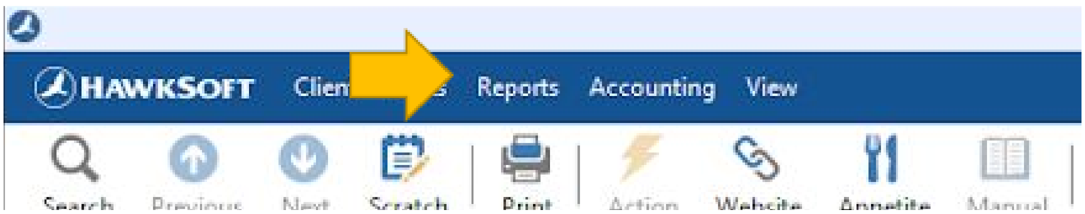
Any log with "Insert Policy" is for an additional policy being added to a client file that is already in the system

The purpose of the “Sales Report” is to see the sales flow of rewrites as well as new business.

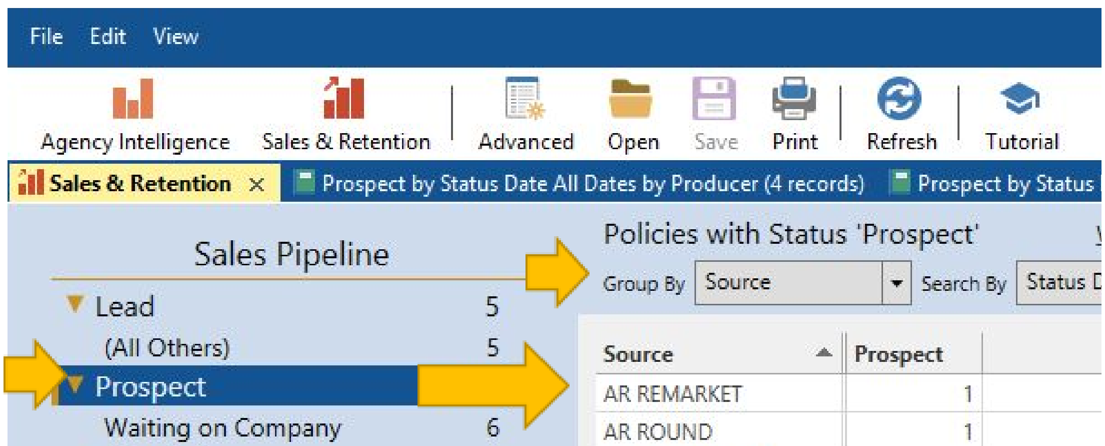
Using the “Sales and Retention” Center for Prospect/Refused/Rejected Report

To find Quotes that have not been sold

Select “Reports” then “Sales & Retention”



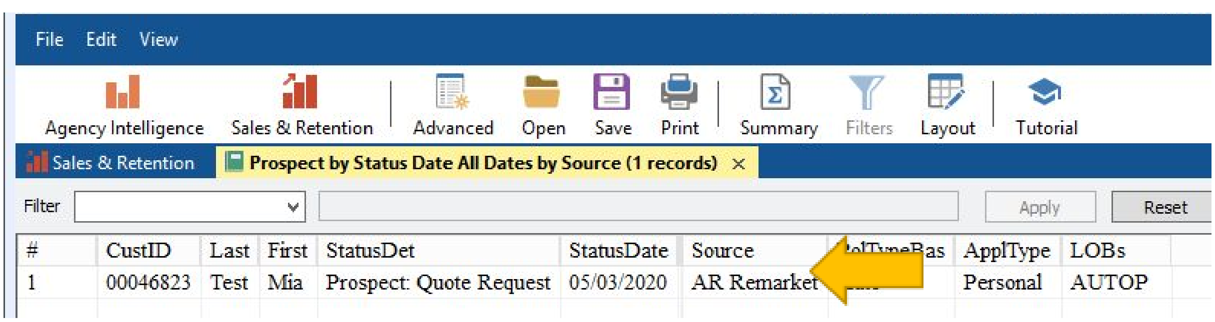
“Sales & Retention” will open in a new window



Click “Prospect”

This shows the number of quotes that are still in the “Prospect” stage.

By clicking on the number under “Prospect” a new report will open with a list of the clients with the specified Source.

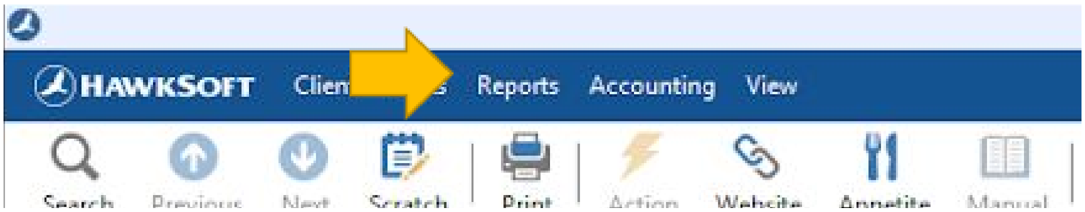


The same directions can be used for “Refused” and “Rejected” under “Sales Pipeline”

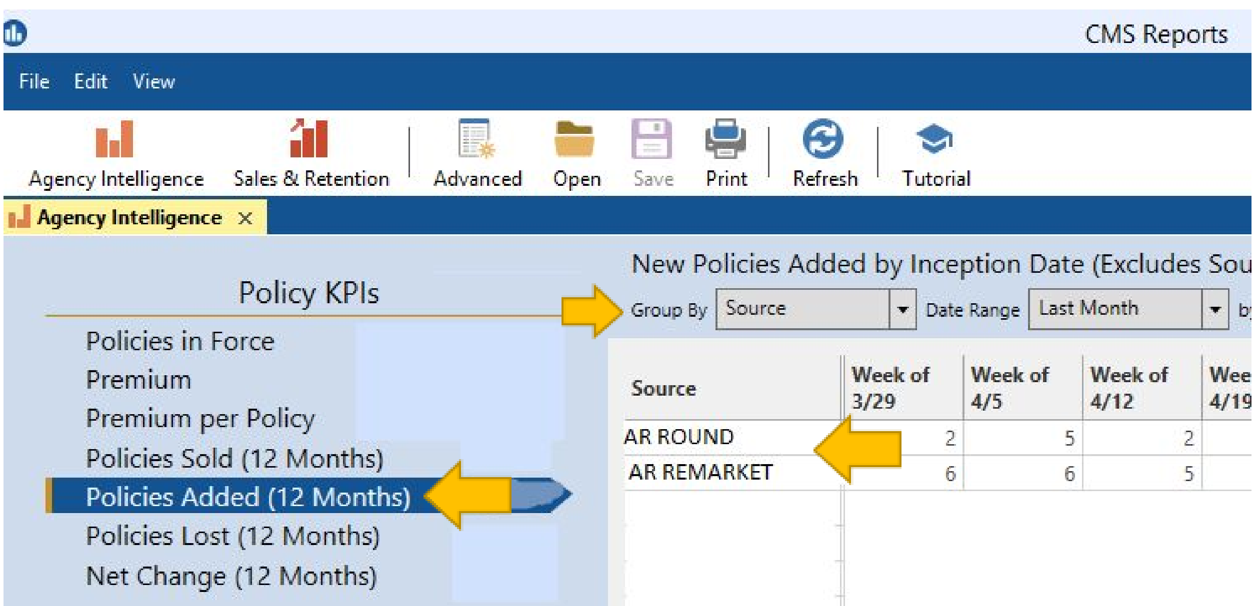
Running a Sold Report

To find Policies that were Issued

Select “Reports” then “Agency Intelligence”



“Agency Intelligence” will open in a new window

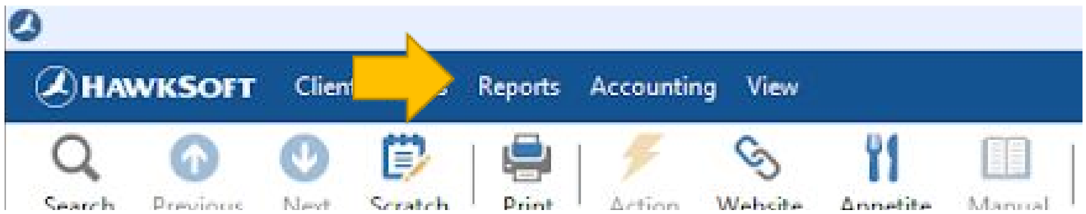


Under “Policy KPI” click on “Policies Added”
Group by “Source”
The date range can be a specific time frame or week, month, etc.

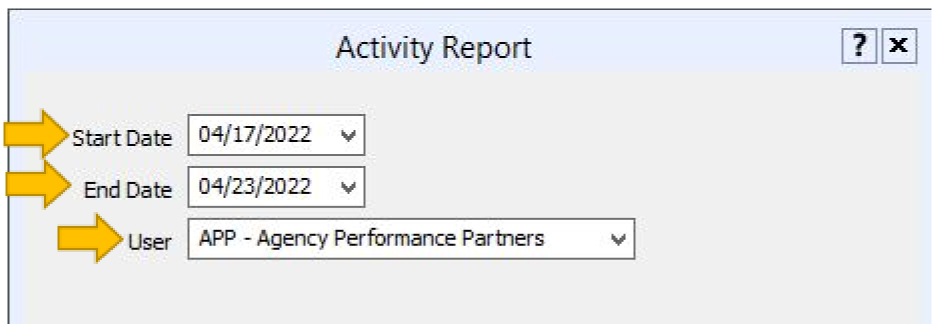
Run “Activity Report” in HawkSoft

The purpose of the “Activity Report” is to better understand what activities each agent has accomplished in the designated time period. This could include what stages of the Sales Process were completed each week.

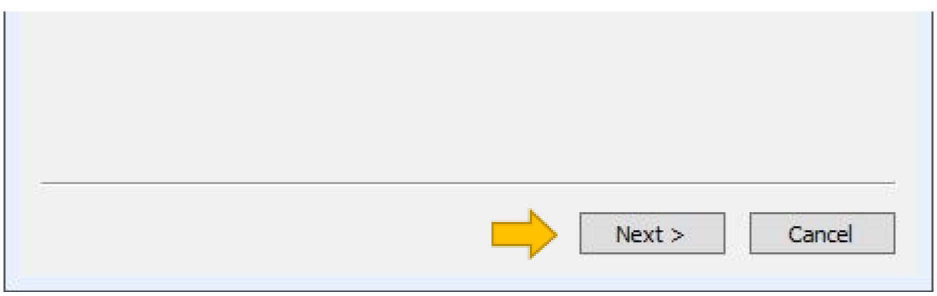
Select “Reports” then “Activity Reports”



“Activity Report” will open in a new window

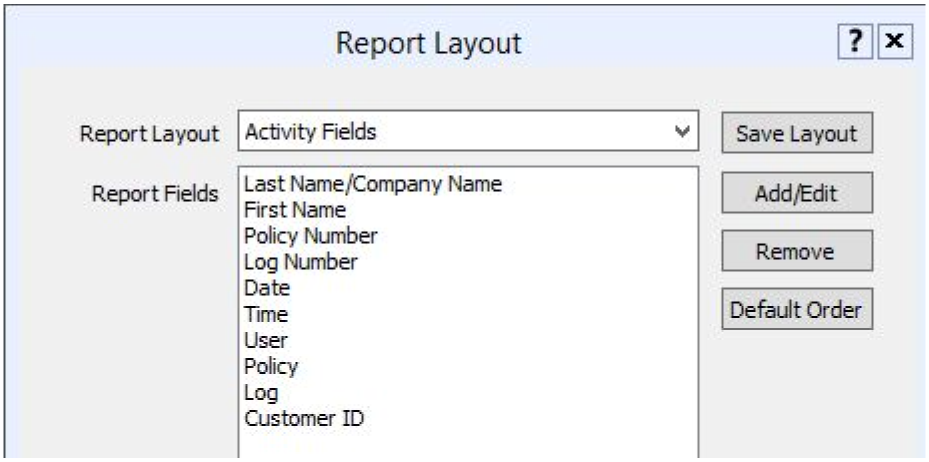


Fill in “Start Date” and “End Date”
Then select the appropriate User from the dropdown

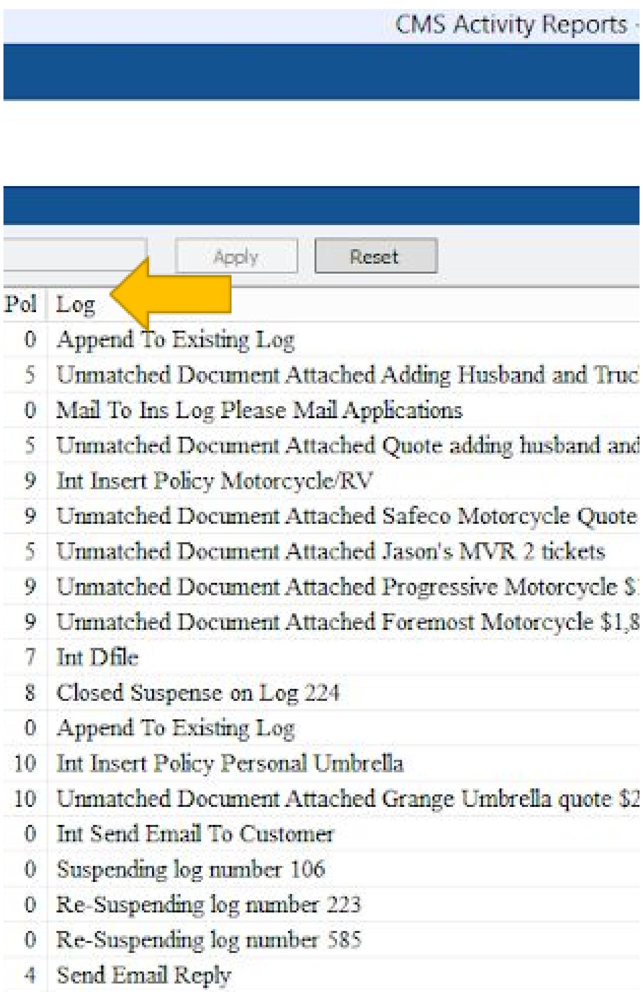


Click “Next”

The “Report Layout” window will open



Click “Finish” and the report will run, then open



Click on “Log” one time sort the report in order of activity

To find specific activities in the Activity Report:

In the empty box type “Day 1 Call 1” (or whatever the specific activity you are looking for) and then click “Apply”

#	First	Log #	User	Pol	Log	Cust ID	C-Producer	Agent	Source	C-Source
1	Laura	1	SAS	1	Agriculture Insert Client	00047452	SAS			XSell Call Out
2	Raleigh	211	SAS	2	Int Insert Policy Agriculture	00000108	SJP	SAS	XSell Call Out	
3	Brian	304	SJP	4	Int Insert Policy Home/Dwelling	00012175	SJP	SJP	AR Round	AR Round
4	Ronald	68	SJP	2	Int Insert Policy Personal Auto	00002585	SJP	SJP		Review XSell
5	Robert	156	CLH	4	Int Insert Policy Personal Auto	00041893	CLH	CLH	Review Rewrite	Web:Company
6	Jason	120	SJP	5	Int Insert Policy Personal Umbrella	00034632	SJP	SJP	Review XSell	Review XSell
7	Jeffrey	361	CLH	6	Int Insert Policy Personal Umbrella	00025436	CLH	CLH	AR Round	Cross Sell:EC
8	jennifer	1	JLW	1	Personal Auto Insert Client	00047451	JLW	JLW	Web:CIA	Web:CIA

A new report will open with just the Clients/Policies that match the search terms that were within the date range specified.

You can also then use “Summary” Summary by “User” to get a list of the specific activity by user

User	# of Items
SJP	2
RLE	12
CLH	21
MLP	4
DIB	17
JLW	3
YAA	2

<u>To export this report to excel:</u>

Click “File” then “Export” then “Report”

Select the correct location you would like the report saved to.
Create a custom name for the report, the “Save as Type” Comma Delimited Text (*.csv)