



HawkSoft User Group

EMBRACING TECHNOLOGY TOGETHER

HUG Webinar

Commercial Renewal Process

September 13, 2023 | 12:00PM CT

HAWKSOFT USER GROUP (HUG)



Have questions... contact us!



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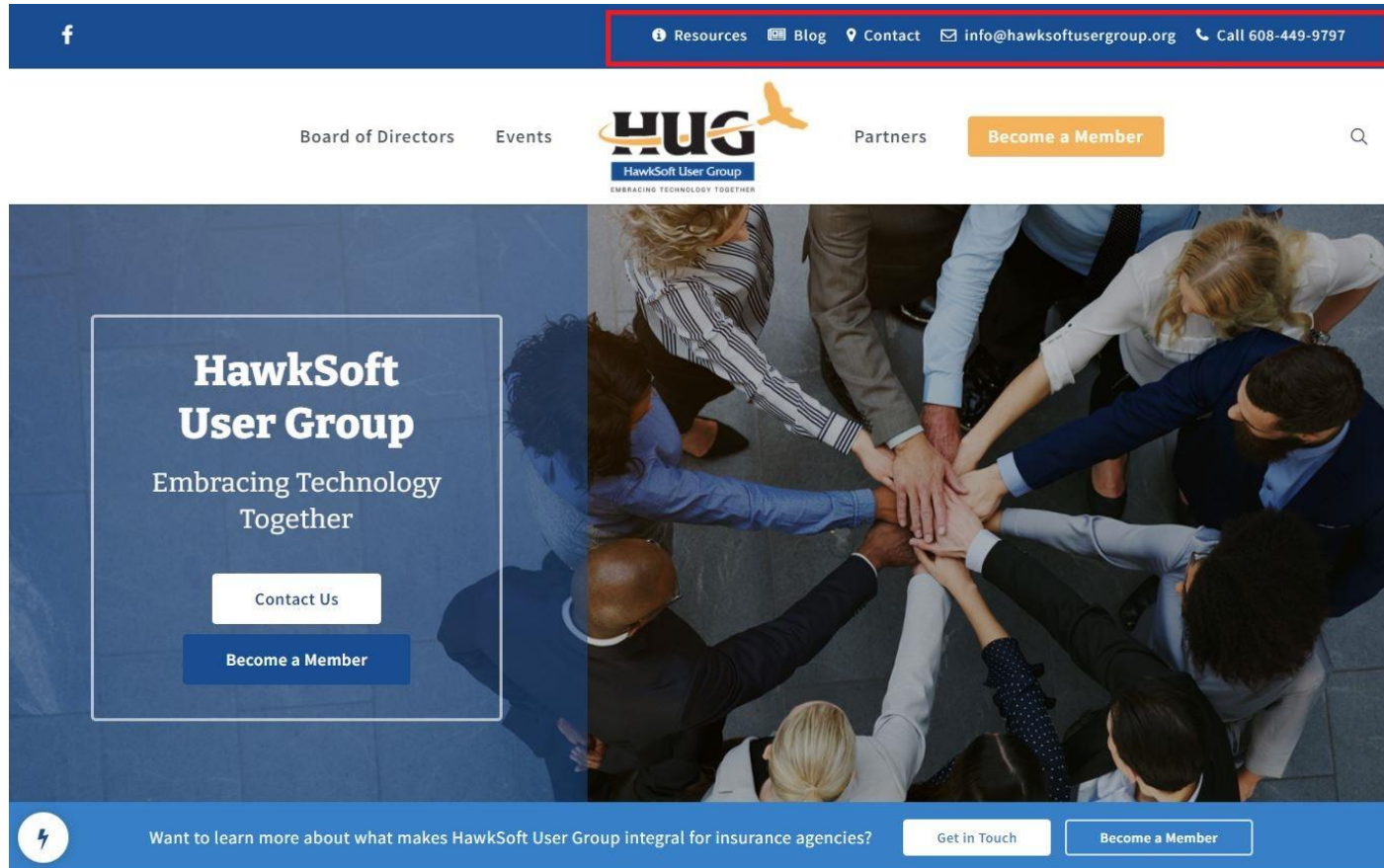
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HUG WEBSITE

<http://hawksoftusergroup.org/>



You're already a member, don't forget to enjoy the benefits!

At the top, click **Resources** menu to see:

- Knowledge Library
- CMS Templates
- Upcoming Webinars
- Recorded Webinars Archive
- Customer Advisory Boards

HUG FACEBOOK PAGE

Over 2,400 members!



<https://www.facebook.com/groups/Hawksoft/>

HawkSoft User Group (HUG)
Private group · 1.9K members

Joined + Invite

About Discussion Mentorship Featured Rooms Topics Your Items More

Write something...

Live Video Photo/video Room

Featured

Pat Lamb
November 24 at 1:23 PM · 🌐
Looking forward to showing ways to

Events
When events are created they appear in this card

About
This Facebook page is the official HawkSoft user group. HUG's Purpose: To provide a place for users to share their experiences and what they post.

Private
Only members and what they post.

Visible
Anyone can find this group.

Members
Events
Media
Files
Guides

HawkSoft User Group (HUG)

Files

Name	Type	Modified
GIS Form Renewal Checklist Operations Port...	Document	August 6 at 6:21 PM
Adding scans folder to Parallels for Mac.p...	PDF	July 29 at 11:57 AM
Marketing_0028_Cyber-Liability.pdf	PDF	June 27 at 4:03 PM
Risk Assessment.pdf	PDF	June 21 at 7:57 AM
HawkSoft Commercial Proposal.PDF	PDF	June 5 at 7:58 PM
Sample .pdf	PDF	May 28 at 10:34 AM
hawksoft local configurations.pdf	PDF	May 26 at 4:31 PM
E-Signature Guide to companies.pdf	PDF	April 15 at 2:13 PM
COI Instruction Checklist.pdf	PDF	April 8 at 10:23 AM
2018 renewal procedures .pdf	PDF	February 11 at 1:28 PM
Adding a fillable PDF or other document to...	PDF	January 18 at 6:51 PM
Profile Contact Proposal to HawkSoft.pdf	PDF	December 21, 2018 at 7:33 AM
National HUG Conference brochure 2019_atte...	PDF	December 20, 2018 at 4:34 PM

Fall Regional Meetings

SIX DATES/LOCATIONS – one day educational event. You can attend any meeting!

- September 7 – Salt Lake City
- September 21 – Cleveland, OH
- September 28 – Milwaukee, WI
- October 3 – Schaumburg(Chicago), IL
- October 12 – Orlando, FL
- October 26 – Long Beach, CA

<https://hawksoftusergroup.org/regional-meetings/>

CARLSBAD
CALIFORNIA

April 3-5

Mark your calendars!

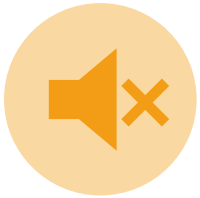
HUG
NATIONAL CONFERENCE
2024

OMNI RESORTS
la costa | carlsbad



Early bird pricing (\$399) ends November 10th - <https://www.eventbrite.com/e/2024-hawksoft-user-group-hug-annual-national-conference-carlsbad-ca-tickets-601713821237>

HOUSEKEEPING



- During the webinar, participants will be muted. Please ask your questions using the Q & A feature, NOT the chat.



- If you are having difficulties hearing the speakers, consider calling in on the phone for the audio rather than listening via your computer.



- We are recording the webinar and you will be emailed a link to the recorded webinar within 24 hours.

TODAY'S PRESENTER

Thank you to...



Nicole Wilson

PAC Insurance Group

Airway Heights, WA

nicolew@pacinsurancegroup.com

Webinar Content Outline

- Processing Commercial Renewals (E & S, Agency Billed)
 - Elements of a complete applications
 - Client communication
 - Maintaining and tracking timelines
 - Updating applications
 - Submissions, quotes, proposals
 - Payment & binding

Setting yourself up for success at renewal



- ➔ Complete Applications, Loss Runs, and Supplements
- ➔ Up to date contact information for your clients
- ➔ **Timelines**
 - 1. Carrier/MGA specific
 - 2. When and what is needed to quote the renewal
 - 3. When and how quotes/indications are received
 - 4. Setting expectations with clients for document/signature returns
- ➔ Application/Supplement to client
 - 1. Including prior year application/supplement to aid client in completing current year updates
 - 2. Giving yourself time when setting a document return date & checking in
- ➔ Using suspenses to track movement through the process
- ➔ Completing diligence early
- ➔ Presenting quote to client
 - 1. Again, being clear on what is needed to bind coverage and when you need it by (give yourself time)
 - 2. Using email templates – efficient, ensures clarity, becomes familiar to your client.
- ➔ Payment & Binding
 - 1. Payment in hand
 - 2. Bind Orders, binding, and policy delivery – using suspenses to track through policy delivery.

SETTING UP SUCCESS



Applications

Agency Intake, ACORDs, Loss Runs, signed release for future LR's, first year supplements.

Updated Contact Info

Ensuring emails and phone numbers are accurate and up to date. (Several tools within HS)

HS Reporting

HS
Reports>Advanced Reports>Renewal Report>Bill Type (or Carrier)

Quarterly Renewal List

Copy report info to list template, see and track status outside HS. (Helps me gauge my workload & manage my timeline)

Workflow begins @ 60 days

Review the file in HS, mid-term changes, prior year docs, diligence planning.

Business Name

UWBW, LLC

Business Entitiy

LLC

DBA: (Doing Business As)

Lucy's Underwater Basket Weaving

Year Business Started

2016

Name of Owner

Lucy Lastname

Is the business owner also the main contact?

Yes

FEIN

123456789

WA UB#

Mailing Address

1000 W Garden Ave, Coeurd'Alene, Idaho 83814

Use the same address for Physical Location?

Yes

Business Phone

(208) 666-1000

Email

lucy@underwaterbaskets.com

Business Website

<https://www.bubblesandbaskets.com>

Est. Gross Sales Receipts

\$250,000.00

Description Of Operations

Instruction provided to adults on how to weave baskets underwater. I have been UWBW for 20 years. I have a master's degree in communication and classes are only offered when lifeguards are on duty.

Do you currently have business insurance?

Yes

How would you like to be contacted?

Email

When do you need coverage to begin

1/1/2016

Upload Documents

Do you have employees, use sub-contractors, temps or leased workers?

Yes

% of work Sub-Contracted

15

Est Annual Sub Costs

5000

of Employees

Est. Annual Payroll

Do you need coverage for tools or equipment?

Yes

Do you need Professional Liability?

No

Do you used hired or non-owned vehicles in the course of your business?

No


Supporting Professional Documents

Coverage for Tools, Equipment or Business Property

15K in basket supplies, 2K in tools

- ✓ Intake
- ✓ ACORDs
- ✓ Supplements
- ✓ Loss Runs (signed request for future loss runs or ACORD 611)
- ✓ Driver Lists, Schedules
- ✓ Any additional documents requested

<https://www.cognitofirms.com/pacinsurancegroup/contractorsconsultantsinsuranceclientinfo>


HAWKSOFT

4 October AB - HUG



Client	Expiring	Renewal Date	Notes	Bound	Quote	Apps
Bubba's Boba T	BA15278-05	10/01/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UWBW, LLC	345681589NPP	10/01/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
John Doe, PI	85643258-01	10/01/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acme Corporation	TN123658756	10/07/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goin' Postal Mail Svcs	TARDIS-1536875	10/07/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Florist Gump, PLLC	CPK-85642301	10/10/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shear Madness, LLC	ADV-568-4444	10/15/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spruce Springclean	333333333	10/17/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wok and Roll	PHPK5684369	10/20/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gravy Train Café	PHPK5684369	10/20/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Under the Rug Cleaners	9635999945-07	10/22/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wunsch, Muller and Mertz	NVV00007815364	10/27/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lettuce Feast	3654-85624	10/30/2023		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

60 Days out

- First Notice to Client of Renewal Update Needed
- ACORDS, Supps, lists & schedules, + Prior Year Docs Emailed to Client = Suspense for 45 Days "Renewal- Waiting Apps"
- Follow up with Client as needed - Reminders
- "Quote Per Expiring" (I prefer not to use this option until much later.)



45 Days out

- *Completed Apps returned
- Make any needed changes to client data in HS
 - Apps sent to UW/MGA for quote
- Set Suspense for 30 days out "Waiting Quote"

30 Days out

- Docs Not Returned from Client
- Mail application packet and maintain good documentation of attempts to make contact.
- Set Suspense (allow mailing time) for "Waiting docs"



30 Days out

- Quote in hand - Move to Present to Client
- No Quote - Follow up with UW and move suspense as needed until quote is rec'd.

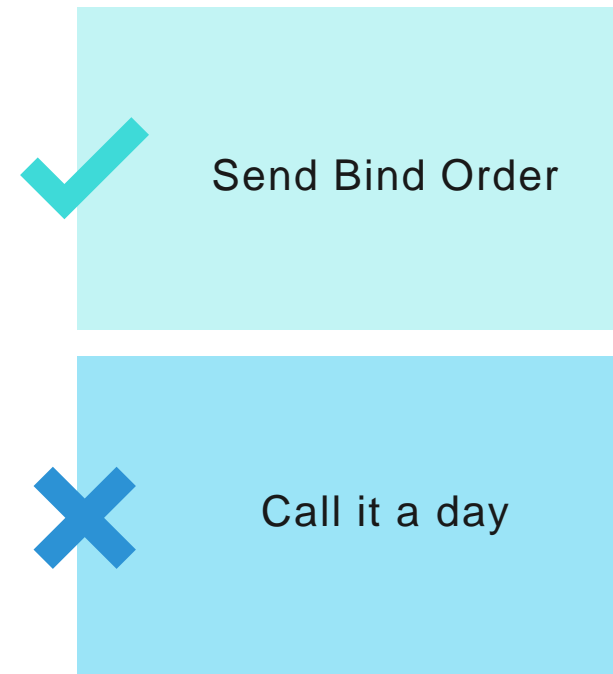
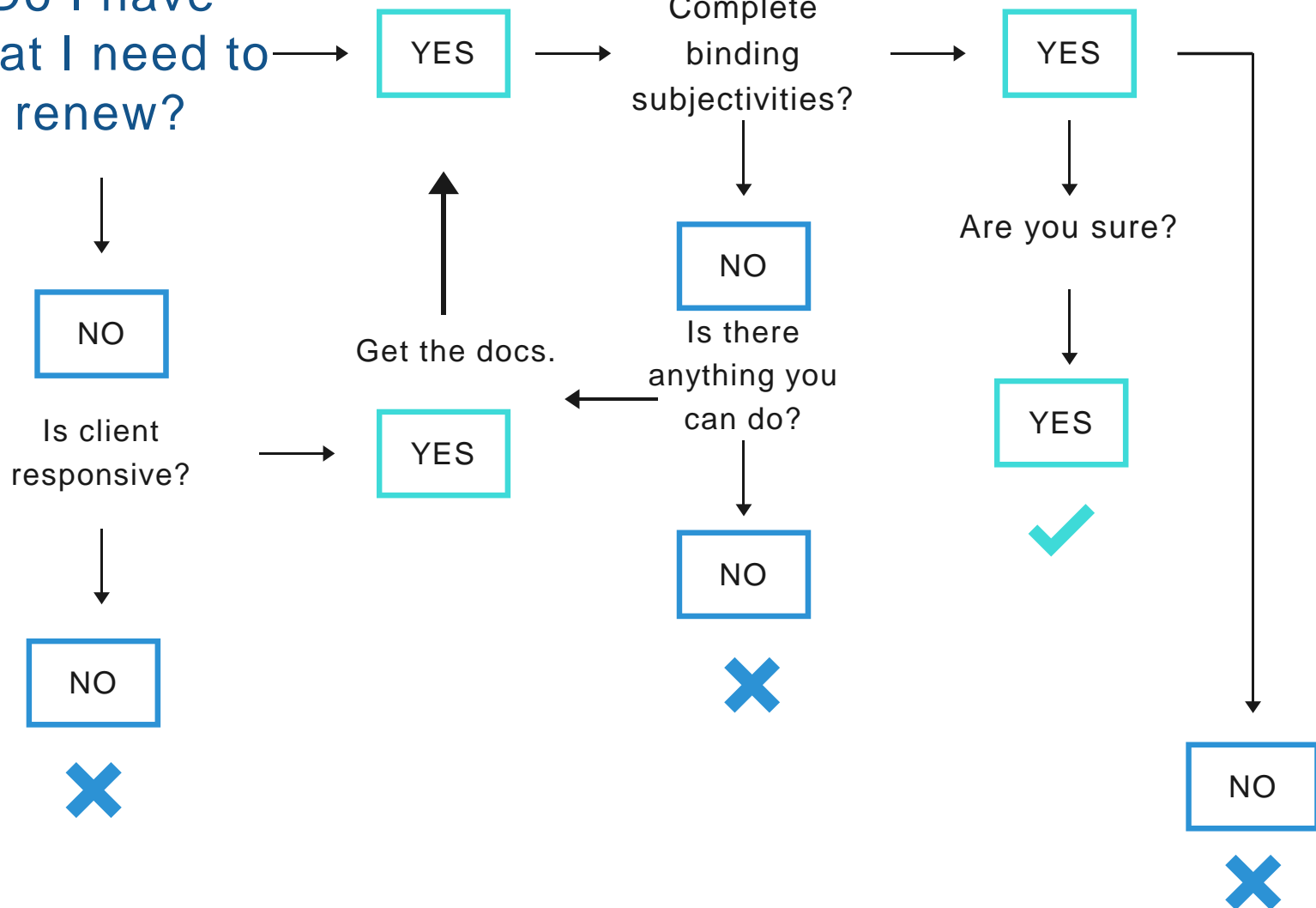


15 Days Out

- Quote per expiring, documenting attempts to contact client for updated applications.

- Most of the UW I work with will have a quote prior to 15 days, if they had apps to work with. If not, you should have a "per expiring" quote to present.

Do I have
what I need to
renew?








Suspenses help manage the timeline

Add Log Entry Comments ? X

Date & Time: 09/11/2023 03:51 PM
User: Nicole C Wilson (NCW)
Log Entry: Suspending log number 50

OK
Cancel

 **B**  U   


RENEWAL UPDATE EMAIL TO CLIENT - ACORDS + SUPP + SCHEDULE SENT TO CLIENT WITH LAST YEARS DOCS TO ASSIST.

SUSPENSE TO FOLLOW UP ON APPS - 08/26

☒ Suspend Transaction (Tickler)

Suspense Date: 08/26/2023 (For an open transaction, leave date blank.)
Assign to: NCW
☐ Assigned agent must close suspense.
Priority: 3
Category: Renewal - Waiting Apps






Add Client Tag 0 Client Tags Added

 Drag and drop files anywhere on this dialog to attach them to the customer's file. [Open In New Window](#)

Add Log Entry Comments ? X

Date & Time: 09/11/2023 03:51 PM
User: Nicole C Wilson (NCW)
Log Entry: Suspending log number 50

OK
Cancel

 **B**  U   


Completed Documents rec'd from client.
Updated Gross Sales, added Loc 2
Emailed updated applications to UW

SUSPENSE FOR QUOTE - 09/09

☒ Suspend Transaction (Tickler)

Suspense Date: 09/09/2023 (For an open transaction, leave date blank.)
Assign to: NCW
☐ Assigned agent must close suspense.
Priority: 3
Category: Waiting Quote





Add Client Tag 0 Client Tags Added

 Drag and drop files anywhere on this dialog to attach them to the customer's file. [Open In New Window](#)

Add Log Entry Comments

Date & Time: 09/11/2023 03:51 PM
User: Nicole C Wilson (NCW)
Log Entry: Suspending log number 50

OK
Cancel

 **B**  U  

Rec'd Quote options from UW - Prepared premium breakdown and quote proposal emailed to client. TRIA coverage fom, NO PFA.

SUSPENSE FOR QUOTE SENT - 09/09

☒ Suspend Transaction (Tickler)

Suspend Date: 09/09/2023 (For an open transaction, leave date blank.)


Assign to: NCW

☐ Assigned agent must close suspense.

Priority: 3

Category: Renewal- Quote Sent

Add Client Tag 0 Client Tags Added

 Drag and drop files anywhere on this dialog to attach them to the customer's file.

Open In New Window

- My log notes for this purpose are brief noting where I am in the process and what is next.
- Setting a priority level and selecting the correct suspense category makes it easier for me to manage renewals.
- Suspense categories can be modified in Setup>Customize Lists>Suspense Categories.

Wrap-up

- Hawksoft Customize Lists set up (Suspense & Attachments)

[https://help.hawksoft.com/webhelp/506HSO/Content/Customize Lists/Customizing Lists.htm](https://help.hawksoft.com/webhelp/506HSO/Content/Customize%20Lists/Customizing%20Lists.htm)

- “Other” tools that I use

Evernote Professional Planner - <https://evernote.com/>

<https://www.cognitoforms.com/templates/shared/pacinsurancegroup/commercialinsuranceclientinfo>

<https://www.cognitoforms.com/templates/shared/pacinsurancegroup/contractorsconsultantsinsuranceclientinfo>

Q&A

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