**epay** policy

**cover desk**

**HUG NATIONAL CONFERENCE**
Carlsbad. Ca 2024

National Conference
Carlsbad, CA

**April 3-5**

**OMNI RESORTS**
la costa | carlsbad

**2024**

**HAWKSOFT**
AGENCY MANAGEMENT SYSTEM

# Join us in California in April to...

➤ Network with fellow HawkSoft agents and share knowledge/experiences
➤ Make connections with HawkSoft and influence its future functionality
➤ Meet industry partners to help improve efficiencies in your agency
➤ Get 1:1 help in the HUG LAB from HawkSoft staff
➤ Learn how to get the most out of HawkSoft
➤ Learn the ins and outs of the new **HawkSoft 6** and to be ready for migration
➤ Benefit from 36 breakouts covering MANY topics
➤ Find solutions to business challenges in your agency
➤ Have FUN with colleagues, industry friends, and family
➤ Enjoy all the hotel has to offer – **golf**, spa, etc.

**We hope to see you there!**

**HUG NATIONAL CONFERENCE**
Carlsbad. Ca 2024

# Register today!

https://HUG2024NationalConference.eventbrite.com

# Conference Testimonials from 2023

## AGENTS:

**Steven Kramer**

"The HUG conference is a fantastic event that brings together Insurance professionals and experts from various fields to share their knowledge and insights. The conference provides a platform for attendees to learn about the latest developments and innovations in technology for insurance agencies, as well as to network with like-minded individuals. The sessions are informative, engaging, and thought-provoking, and the speakers are always top-notch. Overall, the HUG conference is an excellent opportunity for anyone interested in agency technology to stay up-to-date with the latest trends and developments and to connect with other professionals in the field."

**Sue Moschini**

"I want to Thank You for all your assistance during the past 6 months organizing what turned out to be one of the best conferences I've ever attended! The entire HawkSoft team was fantastic. Being on HS only 8 months and our first HUG National Conference, I can honestly say it was well organized – a lot of work, I'm sure! We believe we made a wise decision partnering with your HS family and look forward to the coming exciting years ahead 😊 "

**Curtis Rock**

"I'm a new agent and agency owner and meeting literally everyone has been helpful to my staff and I. Other agents, the HawkSoft staff, and the various vendors have all been very friendly and helpful – bust most importantly – encouraging. My staff and I are implementing HawkSoft currently and are in the training phase while also trying to jumpstart the agency. It's been overwhelming but everyone in the industry has helped keep it exciting."

**Paulette Arnsparger**

"I have been to 5 HUG Conferences and would highly recommend anyone using HawkSoft in their agency to attend them! You will get a lot of great ideas of how to manage your agency using HawkSoft, meeting great people and have a great time while you are doing both! Great job everyone!! Thank you to Paul, Sean and team for providing the tools we need with a user-friendly management system. Best of all, YOU listen to US!! (agents)"

**Michelle Kimmel**

"I'm a first-time attendee for the National HUG Conference and highly recommend Agents and CSRs to participate. Motivating and informative speakers throughout the entire conference. See you at Regionals!"

**Brooke Meyer**

"This was my second HUG conference, and I enjoyed every minute of it, once again! You walk away with tons of information on the system, but its more than that. I was able to reconnect with colleagues/friends that I met last year and meet new. The networking HUG provides is AWESOME! I have referred clients that move out of state that we can no longer write to individuals I met through conference and have received referrals the same way. HUG is something I look forward to every year."

**Kylie Bartlett**

"I love feeling part of a family! The HUG family is special, and I have never experienced anything like it. Being able to speak to executives in Hawksoft and feeling that my opinions are heard and valued is beyond customer service. They love their product as much as we do!"

**Lori Wood**

"I would recommend attending the annual conference. The breakout sessions are invaluable. Having the ability to go to the lab with your laptop and go over problems, questions, concerns within our system was fantastic. I loved having one on one help with support. Also being able to network with fellow agents and users of HawkSoft was very beneficial. The thing that impressed me the most, was the feeling of family and all of the support HawkSoft gave in both the session and throughout the Conference. Great conference! Thank you for all your hard work and preparation. It was a wonderful time."

**Heidi Duncan**

"Conference was THE BEST ever to date! Great job to everyone! Speakers were phenomenal, the venue was amazing."

# HawkSoft User Group (HUG) invites you to attend the 7th Annual National Conference – "HUG 2024" in California!

## 2024 HUG Conference

With almost 2,200 member agencies, HUG currently represents approximately 7,100 independent agents using the HawkSoft management system.
This conference is open to all HUG members and agencies using HawkSoft.
With 350+ agents expected to attend, you're bound to have great opportunities for quality networking. And, with a wide variety of exhibitors/vendors participating in this year's tradeshow, you'll get ample time with 3rd party organizations to further help you in your business. HUG put together a stellar National Planning Committee and worked with HawkSoft to build an agenda to meet your needs – and **ensure you're also ready for HawkSoft 6 migration in 2024**! You will come away with real-life solutions for increasing productivity and agency sales and efficiencies, as well as learning general business, industry, and community trends and quality practices. The conference agenda includes over 30 unique sessions, taught by HawkSoft Users/Agents and HawkSoft Employees.

## Venue – Omni La Costa Resort & Spa

This year's conference will be held at the Omni La Costa Resort & Spa, Carlsbad, CA– approximately 30 minutes north of San Diego. The hotel features two championship golf courses, five restaurants, eight pools, seventeen tennis courts, pickle ball courts, an amazing spa and more! The resort is within easy reach of beaches, and various popular tourist attractions like Legoland, Birch Aquarium and the San Diego Zoo. Check out their website for more information:
**https://www.omnihotels.com/hotels/san-diego-la-costa**

## Hotel Accommodations

The hotel is still taking reservations, but our block is almost sold out, so book now!! You have until **March 4** or until sold out (whichever comes first) to book with our HUG rate($289+fees/taxes).

Direct booking link: **https://www.omnihotels.com/hotels/san-diego-la-costa/meetings/hug-2024-national-conference-04012024**

## Conference Highlights

**Presentations** – 36 breakout sessions to choose from, covering beginner to advanced level classes – and topics such as: AI, HawkSoft 6, HawkSoft 5, workflows, accounting, profitability/retention, business, hard-market growth, sales, tips & tricks, mental health, new revenue streams, etc.
**Conference Webapp/Platform** – You will build your own track of classes in the Whova app 4-6 weeks before conference
**Solution Circles** – Roundtable discussions will take place in the Ballroom (exhibit hall) right before lunch on Friday, covering almost 15 specific topics.
**HUG LAB** – The lab will be open almost all day (except during general sessions), each day – and it will be staffed full-time with HawkSoft staff.
**Exhibit Hall** – Vendors will demonstrate products and services throughout the exhibit hall/ballroom – **We encourage you to visit them as they keep your ticket prices down.** The exhibit hall closes at 2pm on Friday, so don't miss your chance to visit! Prizes!
**Speaker Q&A** – You'll have an opportunity to ask speakers throughout the conference questions you may still have.
**Access to HS staff** – A large team of HawkSoft employees will be in attendance to both teach classes this year to answer questions, as well as work in the lab to give you 1:1 time and help! Take advantage of this quality time with them.

## Receptions

1. **Welcome Reception** – Join us **Wednesday night (6:30-8:30pm)**, for a Havana Nights (Cuban) themed reception to open the conference, pick up your badge, and meet new HUG friends – food, drinks, and music included. Dress/Attire: "Havana Nights Party Attire" – think linen shirts and floral dresses ("look book" included in this brochure)…optional, but encouraged!
2. **Thursday Night Cocktail** party – join us from 5:15-6:15pm, right after the HawkSoft 6 General Session ends, in the exhibit hall for drinks and networking. Dress/Attire: Casual (whatever you wore to the meetings is fine!)

# Register Now!

COST IS $449, please register by Feb. 16 for badge & before price goes up!

Eventbrite

**https://HUG2024NationalConference.eventbrite.com**

# AGENDA

## Wednesday, April 3

**1-5pm** Golf Tournament

**3-8pm** Exhibitor Set up

**6:30-8:30pm** Welcome Reception – on the Luna Lawn for all attendees & exhibitors (wear your "Havana Nights Best" (Cuban)

## Thursday, April 4

**8-9:30am** Registration, Breakfast & Exhibit Hall Open

**9:30-9:50am** Welcome, Color Guard, Conf Announcements

**10-11am** Breakout Sessions:
- Artificial Intelligence/ChatGPT 101
- HawkSoft 5/6 – Commercial Lines – Workflow, Submissions & ACORD forms
- HawkSoft 6 – Accounting
- Power Hour for Advanced Users (Panel Discussion)
- Profitability & Retention
- Agency Growth in a Hard Market
- *HawkSoft 6 Basics – in the Lab*

**11-11:15** Break – Exhibit Hall

**11:15- 12:15** General Session/Keynote Speaker: Alan Stein

**12:15-1:45pm** Lunch and Exhibit Hall Open

**1:45-2:45pm** Breakout Sessions:
- HawkSoft 6 – Downloads
- HawkSoft 5 – Accounting
- VA Panel
- Choosing Vendor Solution Partners
- HawkSoft 6 – Tasks
- Anatomy of a Sale
- *Or visit the LAB*

**2:45-3pm** Break – Exhibit Hall

**3-4pm** Breakout Sessions:
- Artificial Intelligence 201
- HawkSoft 5 – Tips & Tricks
- Agency Acquisitions & Perpetuation
- Website Optimization
- HawkSoft 6 – Commissions
- HawkSoft 5/6 – Certificates of Insurance
- *Or visit the LAB*

**4-4:15pm** Break – Exhibit Hall

**4:15- 5:15pm** General Session/ HawkSoft 6

**5:15-6:15pm** Cocktail Reception – Exhibit Hall

**NOTE: All room names/numbers and presenter names will be posted in the mobile app – so you can sign up for classes, see where to go, etc.**

## Friday, April 5

**8-9:30am** Breakfast and Exhibit Hall Open

**9:30-10:30am** General Session
- **Finding Wins in a Hard Market (30 min) – Mick Hunt**
- **Campfire (30 min) – Rushang Shah**

**10:30-10:45** Break – Exhibit Hall

**10:45-11:45am** Breakout Sessions:
- HawkSoft 6 – Reporting
- HawkSoft 6 – Tips & Tricks
- Platinum Sponsor Forum
- HawkSoft 5 – Commissions
- Efficiency
- Video Proposals
- HawkSoft 6 Basics – *in the Lab*

**11:45-12:30pm** Solution Circles (Tables in Exhibit Hall) – Topics:
- VA's – Effective Workflows
- VA's – Where to Start
- PL Retention
- CL Retention
- PL – CSR Problem Solving
- CL – CSRs Certificates of Ins.
- Tech Stack – Automation
- Tech Stack – AI
- Networking – Reciprocal Relationships
- HawkSoft 6 – Migration Prep
- HawkSoft 6 – Post-Migration
- Agency Clusters – Pros/Cons
- Owner's Circle – 1-15 users
- Owner's Circle – 15+ users
- Reporting – Efficiency Reports
- Reporting – Track your Book

**12:30-1:45pm** Lunch and Exhibit Hall Open

**1:45 – 2:45** Breakout Sessions:
- HawkSoft 5/6 – HawkLink
- HawkSoft 5/6 – Correspondence Templates
- HawkSoft 6 – Activity Tags
- HawkSoft 5 – Reporting
- Additional Revenue Streams
- Automation
- *Or visit the Lab*

**2pm** Exhibit Hall closes

*2-4pm Exhibit Hall Teardown (for exhibitors)*

**2:45-3pm** Break

**3-4pm** Breakout Sessions:
- Recruiting
- HawkSoft 6 – Reporting (repeat)
- HawkSoft 6 – Trust Accounting/Integration
- CSR – Day in the Life
- Mental Health Panel
- HawkSoft 6 – Tasks
- *Or visit the Lab*

**4-4:15pm** Break

**4:15-5:15pm** General Session
- HawkSoft Panel Discussion
- Future of HawkSoft

**5:15pm** Conference closes, ENJOY the hotel & city tonight and safe travels! Thank you for coming!

# TOPICS

*The HUG 2024 National Planning Committee (including 8 agents) met to outline the conference and decide on specific topics to meet your needs, they include:*

**Breakout Sessions**
- Accounting help (in the Lab)
- Additional Revenue Streams
- Agency Acquisition & Perpetuation
- Agency Growth in a Hard Market
- AI 101 (Artificial Intelligence/Chat GPT, etc)
- AI 201 (Adapt Artificial Intelligence to Enhance the Customer Experience)
- Anatomy of a Sale
- Automation
- Certificates of Insurance
- Choosing a Vendor Solution Partner
- Commercial Lines – Workflows, Submissions, ACORD forms, etc.
- Correspondent Templates
- CSR - Day in the Life
- Efficiency
- HawkLink
- Mental Health Panel
- Platinum Partners
- Power Hour for Advanced Users
- Profitability and Retention
- Recruiting
- VA Panel - 7 Companies
- Video Proposals
- Website Optimization

- HawkSoft 5 - Accounting
- HawkSoft 5 - Commissions
- HawkSoft 5 - Reporting
- HawkSoft 5 - Tips & Tricks
- HawkSoft 6 - Accounting
- HawkSoft 6 - Activity Tags
- HawkSoft 6 - Basics (in the Lab)
- HawkSoft 6 - Commissions
- HawkSoft 6 - Download
- HawkSoft 6 - Reporting
- HawkSoft 6 - Tasks
- HawkSoft 6 - Tips & Tricks
- HawkSoft 6 - Trust Accounting

**General Sessions**
- Keynote Address – Raise Your Game
- HawkSoft 6 Overview / Functionality
- HawkSoft Future (panel)
- Campfire: A Framework to Share your Stories
- Finding Wins in a Hard Market

*(note: some of the above sessions will be repeated twice, and all are subject to change, if needed)*

**Solution Circles** - 15 topics/tables! (topics listed on previous page)
**HUG LAB** – Stop by and get your questions answered!

# Keynote Speaker

## Alan Stein, Jr.
## "Raise Your Game"

**ALAN STEIN, JR.**

# BIOGRAPHY

https://strongerteam.com/podcast/

Alan Stein, Jr. teaches proven strategies to improve organizational performance, create effective leadership, increase team cohesion and collaboration, and develop winning mindsets, rituals, and routines.

In his corporate keynote programs and workshops, Alan shares real-world lessons, illustrated by powerful stories, so that every audience can immediately put new ideas into action. He has a passion for helping organizations create high-performance cultures, and his clients include American Express, Pepsi, Under Armour, Starbucks, Charles Schwab, Orangetheory Fitness, and numerous college athletic programs such as Penn State Football and UConn Men's Basketball.

An acclaimed basketball performance coach, Alan spent 15 years working with the highest-performing athletes on the planet (including NBA superstars Kevin Durant, Stephen Curry, and Kobe Bryant). He transfers that knowledge to reveal how leaders and teams can utilize the same approaches in business that elite athletes use to perform at a world-class level.

The strategies from Alan's book, *Raise Your Game: High Performance Secrets from the Best of the Best*, are implemented by corporate teams and sports teams around the country. His inspirational words are featured on a 12-foot mural outside the Penn State Football Training Center, so that players run past it on the way to practice every day.
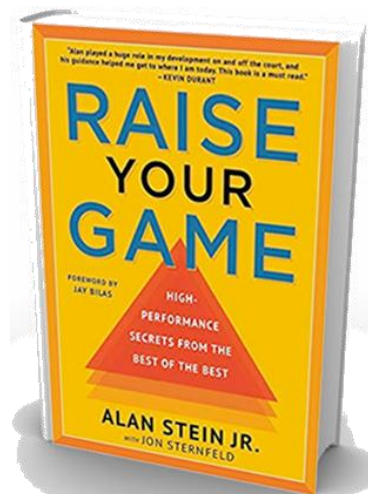
# RAISE YOUR GAME

## How to Maximize Your Individual Performance, Contribution, and Significance

The number one investment you can make is the investment in yourself. To achieve a greater level of success, you must be intentional in developing yourself mentally, physically, and emotionally. If you want more, you must become more.

The key to raising your individual performance and expanding your contributions and significance lies in your ability to master these five fundamentals:

1. Self-Awareness
2. Passion
3. Discipline
4. Coachability
5. Confidence

This can only be achieved by closing Performance Gaps (the gap between what you know and what you do). In this powerful program, Alan teaches practical strategies to heighten self-awareness, create winning habits and routines, and improve productivity.

**Regardless of title or tenure, attendees walk away with actionable steps to:**

- Align your habits with your core values and beliefs
- Improve your Emotional Intelligence (EQ) and develop a true winner's mindset
- Learn to be present in the moment
- Earn confidence while maintaining humility
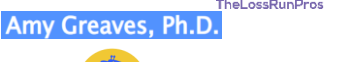- Manage change and create a process for progress

This program is ideal for the *player* looking to improve individual performance and/or contributions to the team (company-wide events, all-hands meetings, teams, employees, and/or entrepreneurs).

# Conference Presenters

## AGENTS

George Patterson, Williamson Insurance Service
Jason Hansen & Nathan Walker, FIG Insurance
Justin Miller, Miller Insurance Agency
Kelly Endicott, John Dawson Associates
Lisa Dickerson, Dickerson Agency, Inc.
Lynnette Wood, Aurora National Insurance
Malena Farrell, Cedar Risk Management
Mike Stansbury, Elite Insurance Solutions

## HUG PARTNERS (and guest speakers)

Bob Whitis, Brightfire
Anurag Shah, Aureus Analytics
Dan Karr, ValChoice
Abraham Boling, The Insurance Dream
Mick Hunt, Strategy Box (guest speaker)
Jason Cass, Virtual Intelligence
Stacie Cooper, Liberty Mutual/Safeco
Zac Franz, ePayPolicy
Andy Priesman, Cover Desk
Stephen Harrington-Descoteaux, Agency Performance Partners
Lightspeed Voice
Jacob Simon, Adapt API
Mike Stromsoe, Unstoppable Profit Producers
Brenden Corr, Run Loss Pro
Amy Greaves, PhD (guest speaker)
VA Panel – Elevate, VIVA, LAVA, Agency VA, VI, Cover Desk, Edge

## HAWKSOFT TEAM MEMBERS

Angela Nice, Anisa Newkirk, Britnee Blanco, Charmin Gibson, Kenny Hendricks, Javier Torres, Linda Anderson, Matt Brauer, Paul Hawkins, Rushang Shah, Sean Hawkins, Tiffany Brown

# Conference Technology & Social Media Info

## BRING YOUR LAPTOP or TABLET!

*We encourage you to bring your laptop to the conference.*

Some classes are hands-on opportunities for you to actually practice what you're learning, including the lab.  Follow along with speakers using the CMS system! WiFi will be available throughout the conference.   And, don't forget….make sure to have your permissions to get into the Agency Intelligence (AI).  Go to "user permissions" under the "user list" in CMS.

Please note: we will not have power/outlets to charge your laptop during breakout sessions, so plan accordingly.

**WIFI INFO:**
SSID:  HUG2024!
Password: ILOVEHUGS

## SOCIAL MEDIA

*We encourage you to post pictures and comments on social media throughout the conference!*

❑ Use the hash tag **#hugnational2024** when you post pictures and write posts

❑ Use the app to start conversations, dinner groups, make comments, share uber rides, etc.

❑ Post comments on the HUG Facebook page and tag your friends in pics

❑ Network with other agents and make new connections on Linked-in

❑ Remember to always respect privacy and ASK FIRST

## HUG
### NATIONAL CONFERENCE
*Carlsbad, Ca*
2024

# escape to cuba
# HAVANA NIGHTS

## LOOK BOOK

**Cuban-themed Opening Welcome Reception**  🌺 **Wednesday, April 3 – 6:30-8:30pm, Luna Lawn**

*Wondering what to wear to the opening reception? Here's some ideas ("look book") …(totally optional!)*
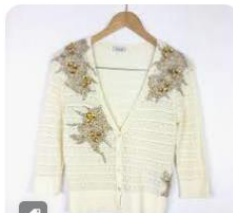
# 1ˢᵗ ever HUG National Conference
# GOLF
# TOURNAMENT

## Wednesday, April 3 at 1pm – Omni La Costa Resort & Spa

**Interested in a fun and casual pre-conference golf game?**

Many of our exhibiting partners have offered to host several foursomes on the Wednesday before the conference starts that night.

If you're interested in learning more about the golf tournament, please click here and the golf sub committee will reach out to you in February with all the details and information, including setting up working with you on who will be in your foursome. Groups will be made up of a combination of partners/sponsors, agents, as well as possibly some HawkSoft staff, and guests.

**GOLF SPONSORS:**

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AGENCY VA

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ivans

edge

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*Massage*

**LA COSTA CUSTOM**
Monday – Thursday $220 for 50 min/$295 for 80 min
Friday – Sunday $245 for 50 min/$320 for 80 min

**AROMATHERAPY**
Monday – Thursday $220 for 50 min/$295 for 80 min
Friday – Sunday $245 for 50 min/ $320 for 80 min

**HOT STONE THERAPY**
Monday – Thursday $295 for 80 min
Friday – Sunday $320 for 80 min

**LOMI LOMI**
Monday – Thursday $295 for 80 min
Friday –Sunday $320 for 80 min

**DETOX HERBAL**
Monday – Thursday $295 for 80 min
Friday – Sunday $320 for 80 min

**CBD TENSION RELIEF**
Monday – Thursday $255 for 50 min/$330 for 80 min
Friday –Sunday $280 for 50 min/$355 for 80 min

**PRENATAL**
Monday – Thursday $220 for 50 min
Friday – Sunday $245 for 50 min

**COUPLES**
Monday – Thursday $450 for 50 min/$600 for 80 min
Friday – Sunday $500 for 50 min/$650 for 80 min

**SUITE SIESTA: BUBBLES & BERRIES PACKAGE**
$675 for 50 min/$850 for 80 min

**MASSAGE ENHANCEMENTS**
FOCUSED BODY WORK $95
REFLEXOLOGY $95

*Packages*

**LUNCH AND LEISURE**
Monday – Thursday $285 per person
Friday – Sunday $315 per person

**INSPIRE**
Monday – Thursday $535 per person
Friday – Sunday $600 perperson

**CELEBRATE & CONGRATULATE**
Monday – Thursday $345 per person
Friday – Sunday $385 per person

**SUITE SIESTA - BUBBLES & BERRIES**
50 minutes $675
80 minutes $850

*Facials*

**OSEA ANTI-AGING DETOX FACIAL**
Monday – Thursday, $220 / Friday – Sunday, $245

**OSEA MEN'S RESTORATIVE FACIAL**
Monday – Thursday, $220 / Friday – Sunday, $245

**AYURVEDIC KANSA FACIAL**
Monday – Thursday, $220 / Friday – Sunday, $245

**KNESKO COLLAGEN FACIAL**
Monday – Thursday, $290 / Friday – Sunday, $315

**LA COSTA HYDRAFACIAL** $300
**DELUXE HYDRAFACIAL** $495

**HYDRAFACIAL ENHANCEMENTS**
GROWTHFACTOR $95
DERMABUILDER $50
BRITENOL $50

**10% off**

# SPA
# HUG DISCOUNT

**Throughout your stay at the Omni La Costa Resort & Spa, all HUG guests are invited to take advantage of the spa services with a \*10% discount.  This includes conference attendees and your guests (ages 18+).  Enjoy!**  *discount not eligible on "packages" (already discounted)*

This top-rated spa has many treatment rooms (massages, facials, etc), a spa café, roman showers, a private jacuzzi and pool for spa guests only, steam rooms, saunas, etc.  Please note the salon (hair/nails) may be closed for renovation during the conference.

**SPA WEBSITE:**  https://www.omnihotels.com/hotels/san-diego-la-costa/spa



**QUESTIONS & RESERVATIONS**
**Rebecca Adams**
*Spa Group Coordinator*
760-929-6383
rebecca.adams@omnihotels.com

# Conference Map/Layout (KEY)

**NOTE:**
HUG has ALL the meeting space in both ballrooms

COSTA DEL SOL SIDE LAWN

LAS PALMAS TERRACE

OFFICE 2

LAS PALMAS 1

LAS PALMAS 2

**Costa Del Sol Ballroom**

CDS TERRACE

COSTA DEL SOL FOYER

SALON A

SALON B

SALON C

SALON D

SALON E

SALON F

SALON G

SALON H

CDS TERRACE

**= Breakout Rooms**

**= General Sessions**

**= Exhibit Space & Meals/Breaks & Solution Circles**

**= LAB & discussion room**

**Opening Reception (Wed 6:30) on CDS Terrace – outdoors**

RESTROOMS

OFFICE 1

**Its outdoors to walk from Costa Del Sol Ballroom to Luna Ballroom**

LOADING DOCK

**Luna Ballroom**

COVERED BREEZEWAY

LUNA 3

LUNA 2

LUNA 1

LUNA 7

LUNA 4

LUNA 6

LUNA 5

RESTROOMS

ECLIPSE 2

ECLIPSE 1

COSTA DE LA LUNA FOYER
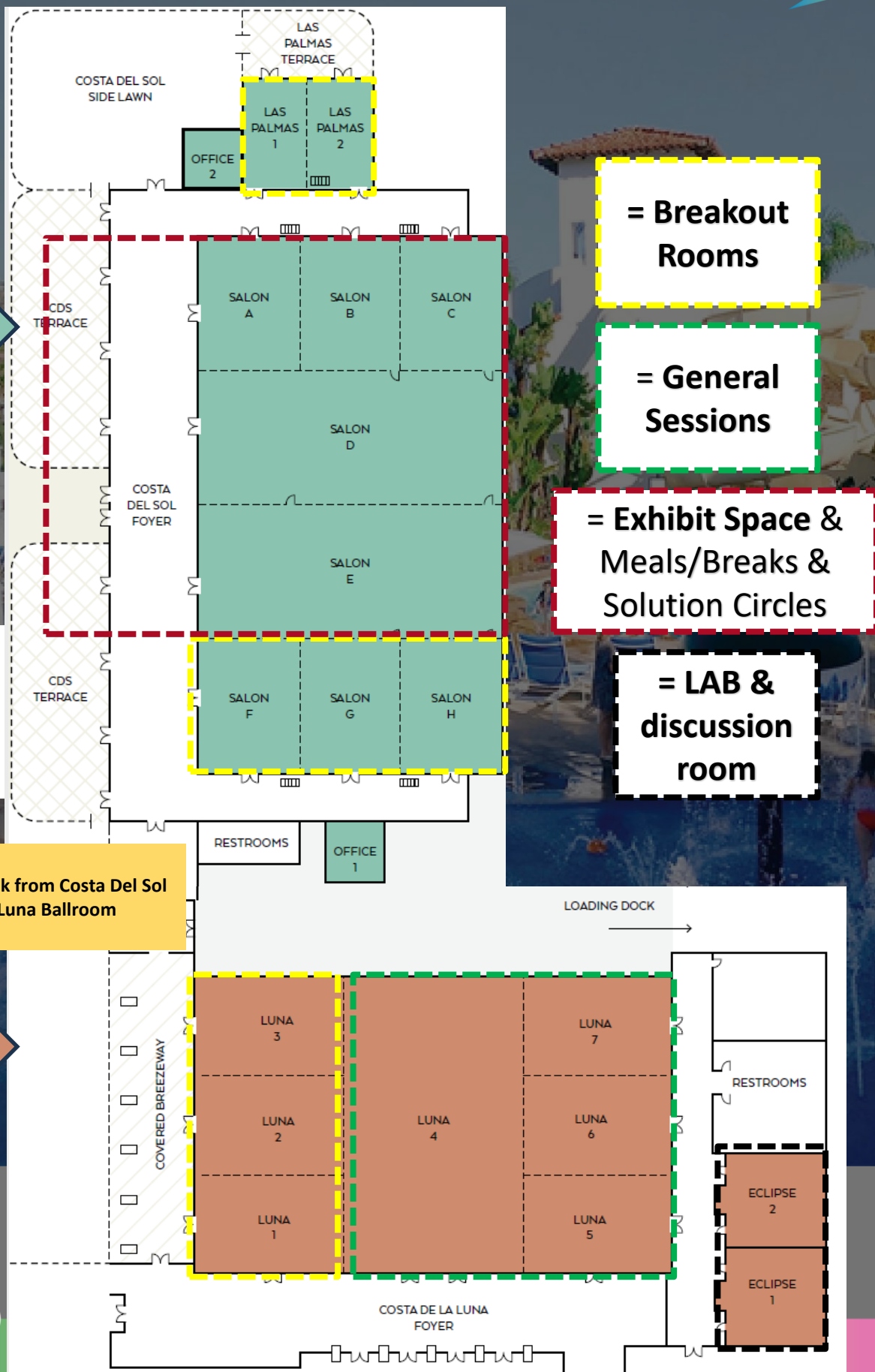
# Hotel Property Map

**Indicates HUG conference spaces (2 ballrooms)**

# Exhibit Hall Floor Map – 2024

All meals will be throughout the exhibit hall.



Our Meal Sponsors will also have a small table (but no booth) throughout the Costa Del Sol Ballroom / meal area

# THANK YOU to our
# HUG 2024 Exhibitors & Sponsors

## PLATINUM SPONSORS

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## PREMIER SPONSORS

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PLM

MARBLE BOX we build

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Adapt API

Liberty Mutual INSURANCE

Safeco Insurance

LAVA

INSUREZONE

Agency Transformation

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ANTHEM SOFTWARE

APP AGENCY PERFORMANCE PARTNERS

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Angela Adams Consulting

InsuranceGIG

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TotalExpert

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