

Presented by



Paul Hawkins (CEO)



Sean Hawkins (VP)

Featuring



Javier Torres
Product Manager



Ryan Reese
Product Owner



Kenny Hendricks
Business Development

With

Produced by



Dana



Amelia

Chat moderated by



Ken

HawkSoft

Proudly serving Independent Agents
since 1995





Mike Skeele

President, HUG Board of Directors



HUG National Conference

April 7 – 9, 2021 in San Diego, CA

- Save the Date!
- If you were already registered 2020 in Orlando and did not request a refund, you are automatically already registered for 2021 in San Diego, and paid up
- If you were registered for 2020 but requested a refund, you will need to register for 2021 in San Diego – reminders will be sent out this Fall
- At the Town & Country Hotel
- **Register Today:** <https://2021hugnationalconference.eventbrite.com>



HUG Fall Regional Meetings

Going Virtual for 2020

- Regional Planning Committee in place
- Planning approximately 6 virtual meetings covering a range of topics and user levels
- Limited seating for live sessions, then recordings will be available
- Registration available in early September
- Stay tuned for dates and topics!





Paul Hawkins

CEO and Co-founder, HawkSoft



Agenda



HawkSoft Awards

Dick Fanazick Award
Referral Program Awards



Year in Review

What did we accomplish in the
last year?



What's Coming

Where will HawkSoft be going in
the coming year?



Town Hall

HawkSoft answers customer
questions



The Dick Fanazick Award

The background of the slide is a blue-toned image showing a series of water droplets falling into a body of water, creating concentric ripples that spread outwards. The droplets are captured at different stages of descent, with the most prominent one just above the surface, creating a clear impact point.

“

Just as ripples spread out when a single pebble is dropped into water, the actions of individuals can have far-reaching effects.

Dalai Lama

”



The Dick Fanazick Award

Award Overview

The Dick Fanazick Story

- Honoring those who have profoundly impacted someone's life.
- Award serves as platform to say, "Thank you, you made a difference."

Award is opened up to HawkSoft customers in 2020

- 13 Nominations
- Committee of 11 reviewed (7 HawkSoft employees; 2 non-HawkSoft employees; 2 HawkSoft customers)
- Winner selected by who best upheld the value and purpose behind the award.



The Dick Fanazick Award

2020 Award Recipient

Congratulations to **Patricia Meeks** – 2020 Award Winner!

- Band Director, Shawnee Middle School & High School Bands (Lima, Ohio)
- Nominated by Michael Ley (Ley Insurance Agency)

“What I didn’t know then was that leadership push, that push for results to achieve your goals and hard work, would become part of my life. It’s easy to forget a student who is quiet, sits back, and doesn’t stand out. Pat never did that. She never gave up pushing me to be the best version of ‘me.’ There are so many times to this day she comes up in conversations I have with people.”

- Michael Ley



The Dick Fanazick Award

2020 Award Recipient

Pat and Michael will each receive:

- \$1,000 donation to a charity of their choice
- \$250 Gift Card
- Handmade plaque by Paul Hawkins

Read more here:

- Dick Fanazick Award and Story – www.hawksoft.com/dick-fanazick-award/
- 2020 Award Winner, Patricia Meeks & Nomination – <http://go.hawksoft.com/dick-fanazick-award-winner2020>



Thank you Pat and Michael!



HawkSoft Referral Race



HawkSoft Referral Program

Overview

New program launched in 2019

- Read more about Referral Race – www.hawksoft.com/referrals/
- Rewarding customers for their commitment to spreading the word about HawkSoft's people and products.

Two ways to win:

1. Earn credit for your **agency**.
2. Earn cash rewards as a referring **agent**.



HawkSoft Referral Program

And the winners are...

2019 Referral Race Winners!

\$500 Gift Card Winner – Malik Bhagat, Legacy Insurance Partners

(Live drawing occurred during webinar and included the top 3 referral winners from each quarter in 2019.)

\$1,000 Grand Prize Winner – Top Referring Agent in 2019

Chris Paradiso, Paradiso Insurance

- \$3,926 earned credit for his agency
- \$1,000 cash award

\$27,833

Total 2019 HawkSoft credits awarded to referring agents





Sean Hawkins

Vice-president of Development
and Co-founder, HawkSoft



Agenda



Year in Review

What did we accomplish in the last year?



Year in Review

Major additions made in the last ~~12~~ 15 months

- Locations in HawkSoft can launch Google Maps.
- Workers' Comp policies enhanced to track Hazards information.
- Ability to import and export lists for Scheduled / Unscheduled Property, for Drivers / Vehicles, and for Certificate Holders.
- Submission Tracking for documents sent to Carriers.
- HawkSoft started tracking Policy History.
- Significant improvements to Certificate of Insurance workflows, including better tools for sending out certificates.



Year in Review

Each update brings incremental improvements

Such as...

- New Merge Fields for Correspondence and Text Message templates.
- Commission Override workflows for Remarketed policies.
- Additional options for a User's default web browser **AND** the ability to set a default web browser per Carrier.
- Ability to update NAIC Codes using Data Replace and adding Carrier-specific NAIC Codes in Policy / Carrier Setup.



Year in Review

HawkSoft in the Cloud

- **HawkSoft Data Sync** freed agency data for use with web-based and cloud-based features, services, and integrations.
- Introduced first **integration** with Insurance Agent App, a mobile app for the insured.
- Launched **HawkSoft Text Messaging**, a new core function of HawkSoft available to all customers at no additional cost.
- Launched **Self-service Certificates**, an add-on for agencies to give trusted insureds the ability to produce on-demand COIs.
- Introduced **Seat Management** tools to simplify managing your HawkSoft License.



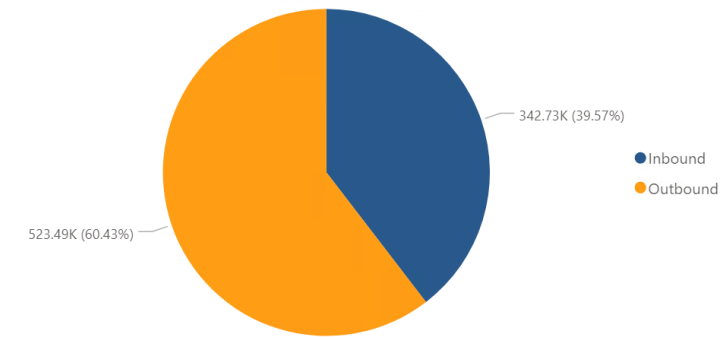
Spotlight: Text Messaging

So far in 2020:

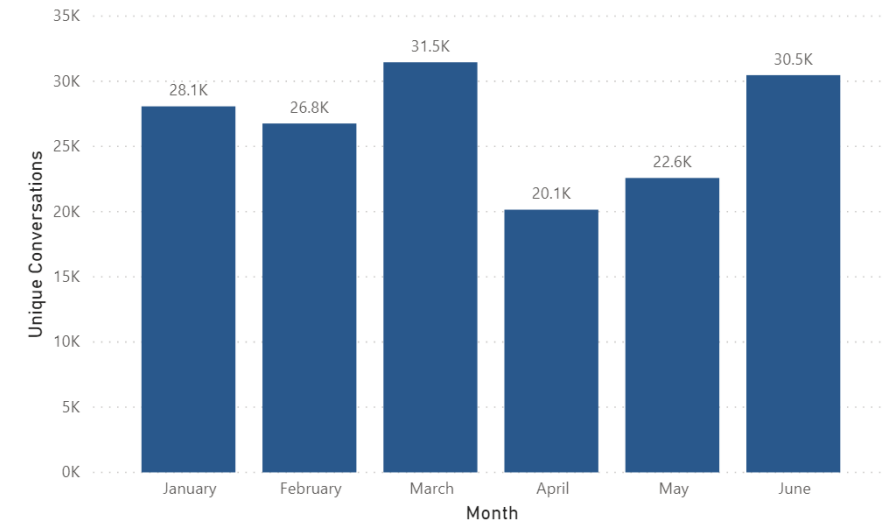
- Over 30% of HawkSoft agencies use HawkSoft Text Messaging.
- Agencies have had over 120K unique text conversations with their insureds.
- Over ½ million text messages sent and received.

We hear you want Main Line Texting...

Messages Sent and Received



Unique Conversations by Month





Ryan Reese

Product Owner, HawkSoft



Self-service Certificates



- Presented by **Sean Hawkins** (VP, Development) and **Ryan Reese** (Product Owner)



Kenny Hendricks

Business Development Coordinator, HawkSoft



Partner API

Extend the HawkSoft Platform with trusted partners



Want your favorite vendor to integrate? Send them to opportunities@hawksoft.com.



Partner API

Coming Soon



Want your favorite vendor to integrate? Send them to opportunities@hawksoft.com.



Agenda



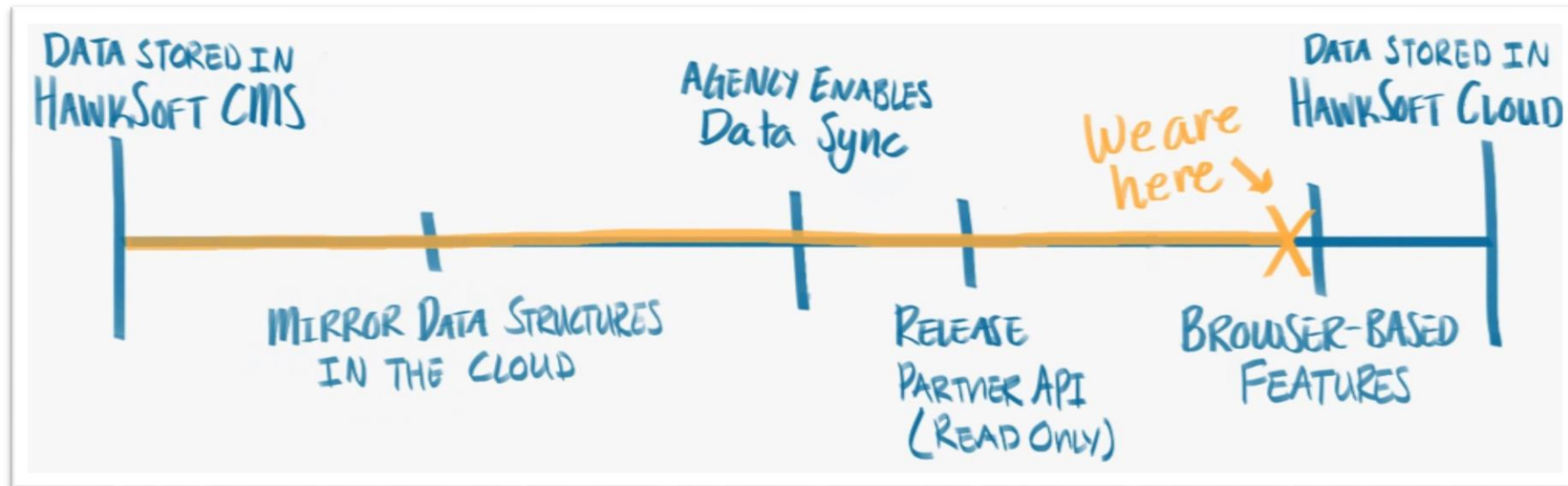
What's Coming

Where will HawkSoft be going in
the coming year?



HawkSoft Cloud Project

Where we're at



But what's next?

HawkSoft 5

HawkSoft 5



```
graph TD; A[HawkSoft 5] -.-> B[Strong Authentication]; A -.-> C[New Search]; A -.-> D[Agent Portal];
```

Strong
Authentication

New
Search

Agent
Portal



Javier Torres

Product Manager, HawkSoft



Strong Authentication



- Presented by **Javier Torres** (Product Manager)

Strong Authentication

Overview

Our guidelines for this project:

1. To provide secure access to data that is available via a browser.
2. To avoid having yet another password.
3. To keep things simple.



Strong Authentication

User Management

HawkSoft User List

Users User Templates

User	Name	Account Status
AAA	Anew User	Tracking Only
ABE	Abraham Lincoln	Tracking Only
CAF	Cindy F	
CLP	Christy Pa	
DMI	Dion	
EMM	Elon Musk	
FDR	Franklin Roosevelt	
FMC	Fred McGrath	
JDD	Jake D	
JJT	Javier Torres	
MRS	Mindy	
NNN	New Usertoo	
OOO	New User1	
PSC	Patrick	
RJA	Richard	
RNX	Richard M. Nixon	
TRT	Tiffany B	
ZZZ	ZZ Top	

Edit
New
Print

OK Cancel Apply

☐ Show inactive users

M)

General

Initials Update Password ☐ Commissions and Sales tracking only

Name ☐ Require new Password on next login

☐ User is inactive

Delete



Strong Authentication

Security

✕

 **HAWKSOFT**
Client Management System

A strong password is required to log in to CMS. Please update your password.

New passwords must be 8 to 32 characters and contain at least three of the following:

- Uppercase Letter
- Lowercase Letter
- Number
- Special Characters
! - @ # \$ % ^ * () + _ < = > [] `

New Password

Confirm Password

OK

Cancel

Client Management System Login

 **HAWKSOFT**
Client Management System

Agency Id 99999056

←

User Initials CAF

OK

Password

Cancel

☐ Remember Me

←

Your continued use of this software constitutes acceptance of the HawkSoft Terms & Conditions which is subject to change from time to time.
[Read full Terms and Conditions](#)



New Search



- Presented by **Ryan Reese** (Product Owner)

HawkSoft Community

Most requested improvement

43

VOTE

Search By Risk Address

We need the capability to search by the physical address of the property being insured. For e...

Lewis Poppelreiter · 2 yrs ago · 2 replies · 👁 68 · 👍 43 · Last reply 6 mths ago

PLANNED

33

VOTE

Search by Property Location - NOT Mailing Address

Very important for commercial lines, and I'm shocked this isn't doable in HawkSoft. If a client...

Kristie English (KRE) · 2 yrs ago · 4 replies · 👁 44 · 👍 33 · Last reply 1 yr ago

PLANNED

17

VOTE

Need the ability to search by property address

I have insureds who have multiple files with us with different commercial property locations...

Rick Braile (RJB) · 2 yrs ago · 2 replies · 👁 15 · 👍 17 · Last reply 1 yr ago

ACKNOWLEDGED



Agent Portal



- Presented by **Ryan Reese** (Product Owner)



Sean Hawkins

Vice-president of Development
and Co-founder, HawkSoft



HawkSoft in the Next Year

What is on our roadmap?

- Frequent additions to Partner API integrated vendors
- Cloud-based Accounting
- Cloud-based Reporting
- Cloud-based Task Management
- R&D Projects
 - Deeper direct integration with insurance carriers
 - Tools for submitting commercial apps
 - HawkLink



HawkLink

for Google Chrome



- Presented by **Sean Hawkins** (VP, Development)

Agenda



Town Hall

HawkSoft answers customer
questions



Town Hall

Town Hall Questions

Submitted by attendees

“

When will HawkSoft be a
browser-based system?

”

Raymond Burkett

STRONG TOWER INSURANCE, INC.



Town Hall Questions

Submitted by attendees

“ Will there always be a local install / server option for HawkSoft?

Bill Syddall

ALINK INSURANCE SERVICES, LLC

”



Town Hall Questions

Submitted by attendees

“

Do you have plans to allow historical reporting and open the reporting period to longer than 120 days?

”

Pat Lamb

SELECT INSURANCE SERVICE

George Patterson

WILLIAMSON INSURANCE



Town Hall Questions

Submitted by attendees

“ Is HawkSoft going to provide a way to have sales and retention automations? If not, we must have integration with CRMs. Agents do not want a tech stack that does not communicate with one another and have to make duplicate entries.

Paul Rentz

RENTZ & RENTZ INSURANCE INC.

”



Town Hall Questions

Submitted by attendees

“ Will we have a better way to track short term policies - hole in one, wedding, travel, contract bonds less than six months or even a single day?

Bill Quickel

INSURANCE PLUS AGENCIES, INC.

”



Town Hall Questions

Submitted by attendees

“ Can we be alerted or receive a push notification when a new suspense has been set for us?

Lynette Wood

AURORA NATIONAL INSURANCE

”



Town Hall Questions

Submitted by attendees

“ Will there be an option implemented to link an NAIC code to a specific insurance carrier when they have multiple paper that policies are written on?

Shanda Krieger

RENDEZVOUS INSURANCE

”



Town Hall Questions

Submitted by attendees

“ Can we have a way to color code the insured name or something else to classify clients as A / B / C or VIP? I know about the Misc Info field, but that’s more clicks and it does not jump out at you when the client screen comes up. We have thought about the tags also but have not done that.

Marc Musso

MUSSO INSURANCE AGENCY, LLC

”



Town Hall Questions

Submitted by attendees

“

When we go to HawkSoft Cloud, will you also support our email system as our current online hosting provider does (we are on Kotter)?

”

Holli Wint

MITCHELL-JOSEPH AGENCY



Town Hall

Thank You
