

# Presented by



Paul Hawkins (CEO)



Sean Hawkins (VP)

# With

# Produced by



Dana



Amelia

# Featuring



Javier Torres  
Product Manager



Ryan Reese  
Product Owner



Kenny Hendricks  
Business Development

# 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

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- 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

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- 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

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## 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 features a series of concentric blue ripples on a water surface, with three water droplets falling vertically from the top towards the center. The overall color palette is various shades of blue, creating a calm and reflective atmosphere.

“

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

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### 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

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## 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

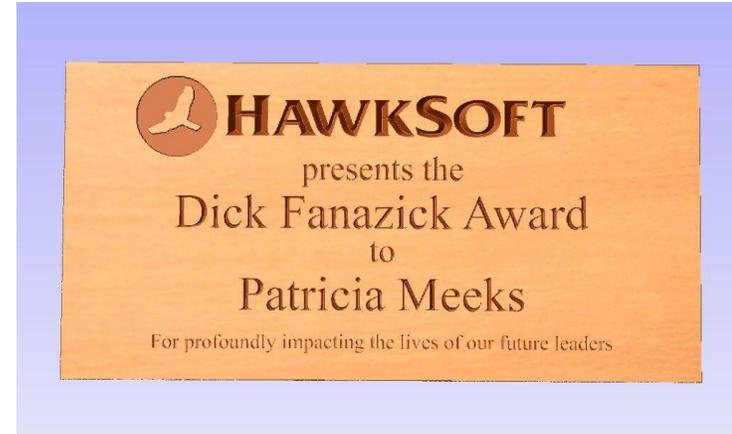
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Pat and Michael will each receive:

- \$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/](http://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

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### New program launched in 2019

- Read more about Referral Race – [www.hawksoft.com/referrals/](http://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...

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## 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

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## Year in Review

What did we accomplish in the last year?



# Year in Review

Major additions made in the last 12-15 months

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- 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

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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.

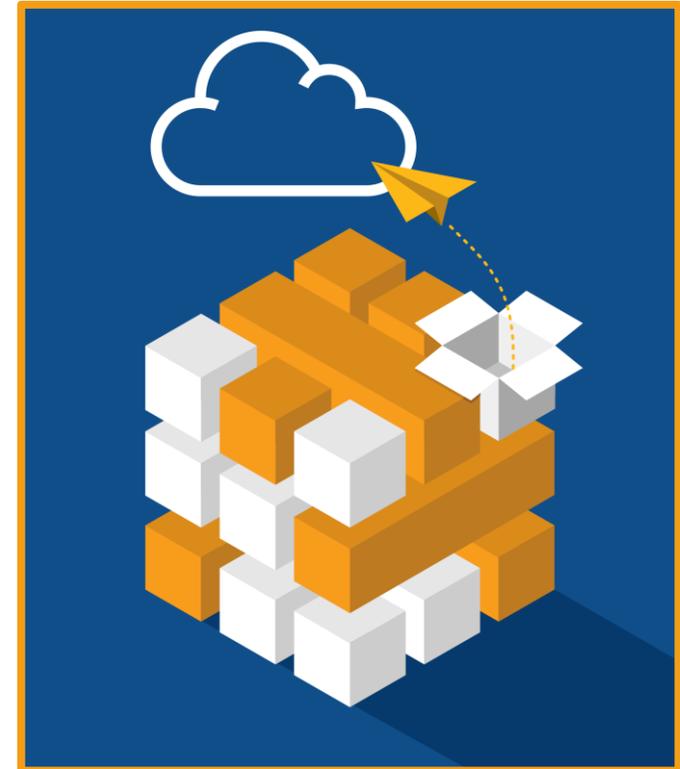


# Year in Review

## HawkSoft in the Cloud

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- **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.



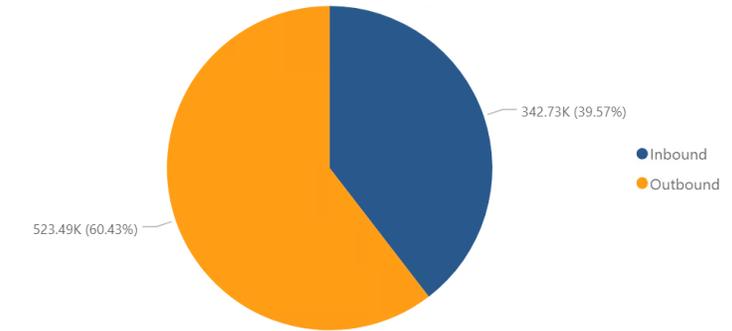
# Spotlight: Text Messaging

So far in 2020:

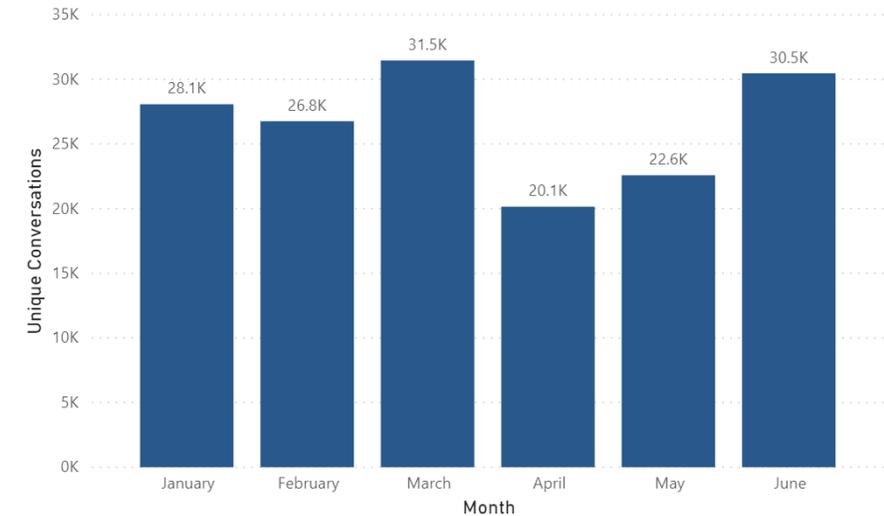
- **Over 30%** of HawkSoft agencies use HawkSoft Text Messaging.
- Agencies have had **over 120K** unique text conversations with their insureds.
- **Over ½ million** text messages sent and received.

We hear you want Main Line Texting...

Messages Sent and Received



Unique Conversations by Month





# Ryan Reese

Product Owner, HawkSoft



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# Self-service Certificates

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- 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](mailto:opportunities@hawksoft.com).



# Partner API

Coming Soon

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Want your favorite vendor to integrate? Send them to [opportunities@hawksoft.com](mailto:opportunities@hawksoft.com).



# Agenda

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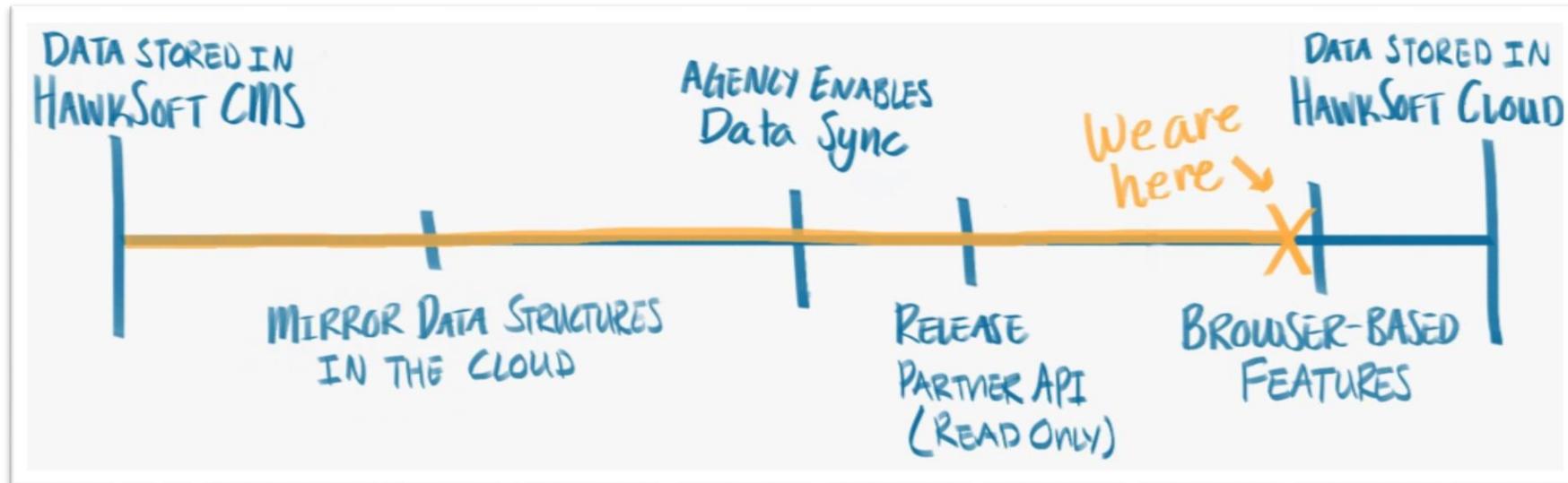
## What's Coming

Where will HawkSoft be going in the coming year?



# HawkSoft Cloud Project

Where we're at



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But what's next?

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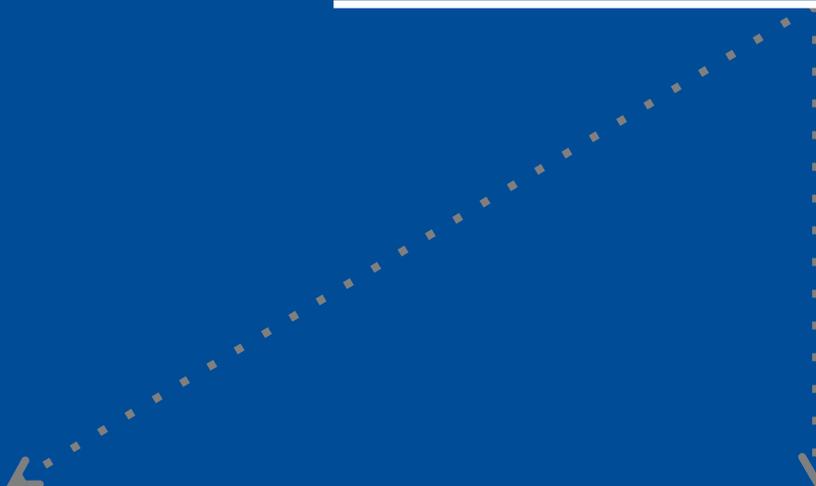
HawkSoft 5

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# HawkSoft 5

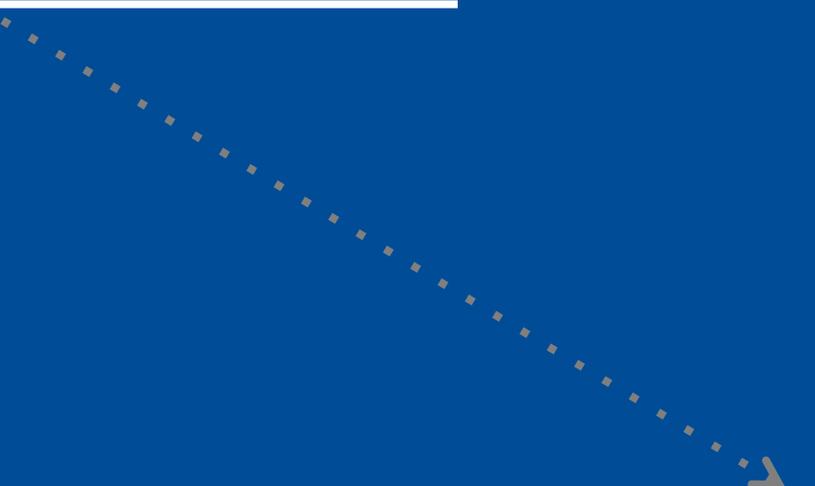
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Strong  
Authentication



New  
Search



Agent  
Portal



# Javier Torres

Product Manager, HawkSoft



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# Strong Authentication

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

# Strong Authentication

## Overview

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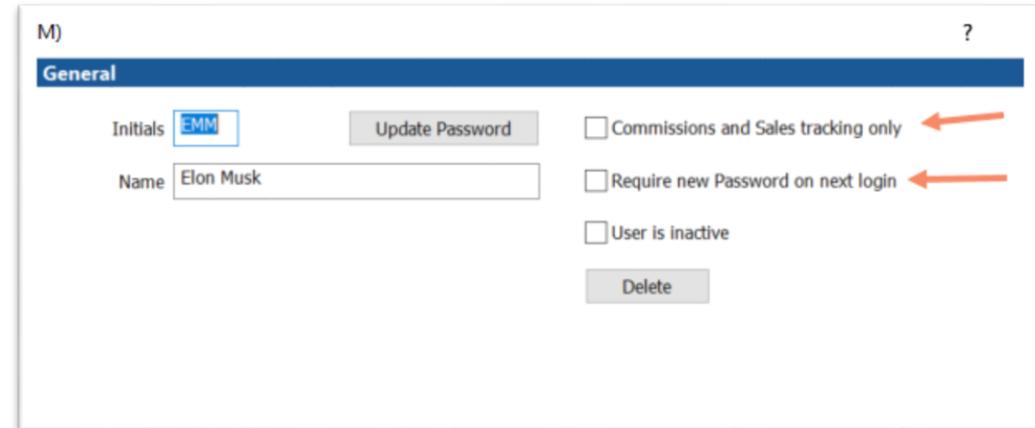
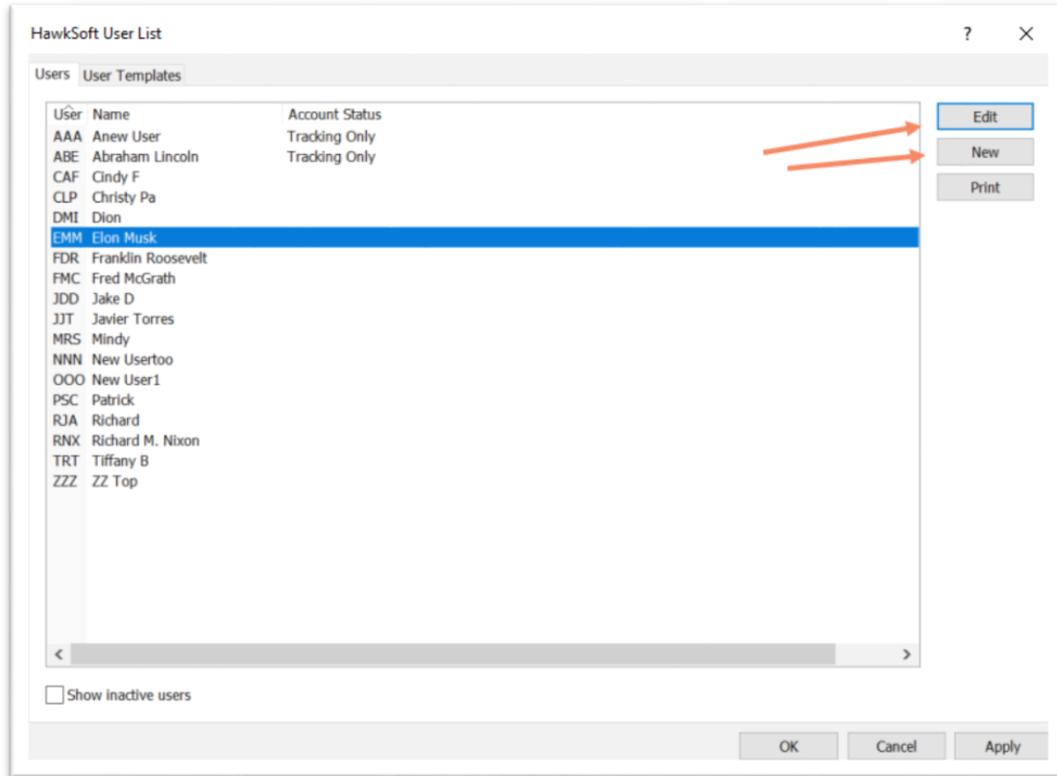
Our guidelines for this project:

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



# Strong Authentication

## Security

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Password Reset



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



Agency Id 99999056

User Initials  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](#)



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# New Search

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- 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



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# Agent Portal

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- 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?

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- 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



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# HawkLink

for Google Chrome

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

# Agenda

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## Town Hall

HawkSoft answers customer questions



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# Town Hall

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# Town Hall Questions

Submitted by attendees

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“

When will HawkSoft be a browser-based system?

”

**Raymond Burkett**  
STRONG TOWER INSURANCE, INC.



# Town Hall Questions

Submitted by attendees

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

**Bill Syddall**

ALINK INSURANCE SERVICES, LLC

”



# Town Hall Questions

Submitted by attendees

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“ 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

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“ 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

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“ 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

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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

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“ 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

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“ 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

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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



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# Town Hall

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Thank You

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