AGENCY INTELLIGENCE™
Raise the Bar of Measurable Analytics

HAWKSOFT

Agency Intelligence is HawkSoft's powerful data analysis engine.
Fuel your agency's success by measuring data that matters, not vanity metrics.

Agency Intelligence™ arms owners with a clear strategic picture of their business with instant access to key metrics for sales, operations, and top performers. Easily determine what's working and not working in your agency's marketing, sales, retention, and production strategies.

Intelligent Customer and Policy KPIs (key performance indicators) and customizable Sales and Retention Tools make monitoring the pulse of your agency automated and more reliable than ever.

Agency Intelligence is the solution to better business management.

> " *It's made a huge difference in retention and I use it extensively at year-end to confirm the database and cancellations are correct. Life is so much easier now that I don't have to waste hours running multiple reports. HawkSoft continues to amaze and delight.* "

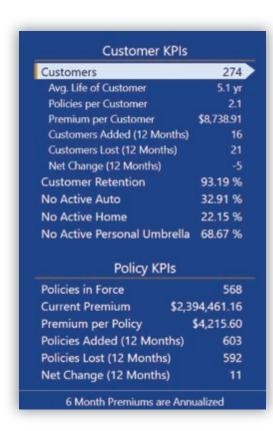**Heidi Duncan**
Duncan & Associates Inc.

How Agency Intelligence is Unique

Agency Intelligence is a core feature of HawkSoft and available at no extra cost. We don't believe your agency should be hostage to additional fees to get the vital analytics that can impact business decisions and the future of your agency. All metrics and sales and retention tools are included in the HawkSoft system.

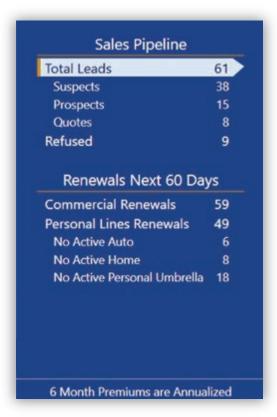| Feature Included in Base System	HawkSoft	Other Systems
Manual Reporting	Yes	Yes
Automatic Reporting	Yes	No
Aggregated KPIs	Yes	Most Charge Extra $
Sales Pipeline / Funnel reporting	Yes	Most Charge Extra $
Batch action from reports turned into email campaigns and mass-reminders	Yes	Most Charge Extra $

Business Intelligence
One dashboard to monitor the pulse of your agency

Customer KPIs	
Customers	274
Avg. Life of Customer	5.1 yr
Policies per Customer	2.1
Premium per Customer	$8,738.91
Customers Added (12 Months)	16
Customers Lost (12 Months)	21
Net Change (12 Months)	-5
Customer Retention	93.19 %
No Active Auto	32.91 %
No Active Home	22.15 %
No Active Personal Umbrella	68.67 %

Policy KPIs	
Policies in Force	568
Current Premium	$2,394,461.16
Premium per Policy	$4,215.60
Policies Added (12 Months)	603
Policies Lost (12 Months)	592
Net Change (12 Months)	11

6 Month Premiums are Annualized

Customer & Policy KPIs

KPIs tell a story about the overall health of your agency. Drill down from this snapshot to see detailed policy-level data behind each of these KPIs. Filter by performers like carrier, office, and producer.

- Identify trends
- Compare results between time periods
- Create custom reports with policyholder details in just 1 or 2 clicks

Sales Pipeline	
Total Leads	61
Suspects	38
Prospects	15
Quotes	8
Refused	9

Renewals Next 60 Days	
Commercial Renewals	59
Personal Lines Renewals	49
No Active Auto	6
No Active Home	8
No Active Personal Umbrella	18

6 Month Premiums are Annualized

Sales and Retention Tools

Forecast revenue, discover account rounding opportunities, and identify revenue-generation bottlenecks before they become problems. Get clear visibility into sales and retention.

- Intuitive sales pipeline
- Uncover and assign opportunities for account rounding, cross-selling, and follow-up tasks
- Quickly identify and vet leads and prospects