

WHY AUTOMATE YOUR AGENCY?



The right agency management system empowers staff with tools to:

Automate daily tasks | Track agency success | Help grow your bottom line | Reduce E&O exposure

Automation doesn't replace employees. It frees their time to focus on high-impact activities like building meaningful relationships with your clients, community outreach, marketing, and sales.



Increase Agency Productivity & Efficiency

Automating workflows lets you eliminate backlogs, maintain current information on clients, reduce manual print and mailing, and boost productivity by 30%.

With automation you:

- Save over 400 hours/year on searching for documents
- Reduce costs of maintaining a filing system
- Reduce the percentage of lost documents

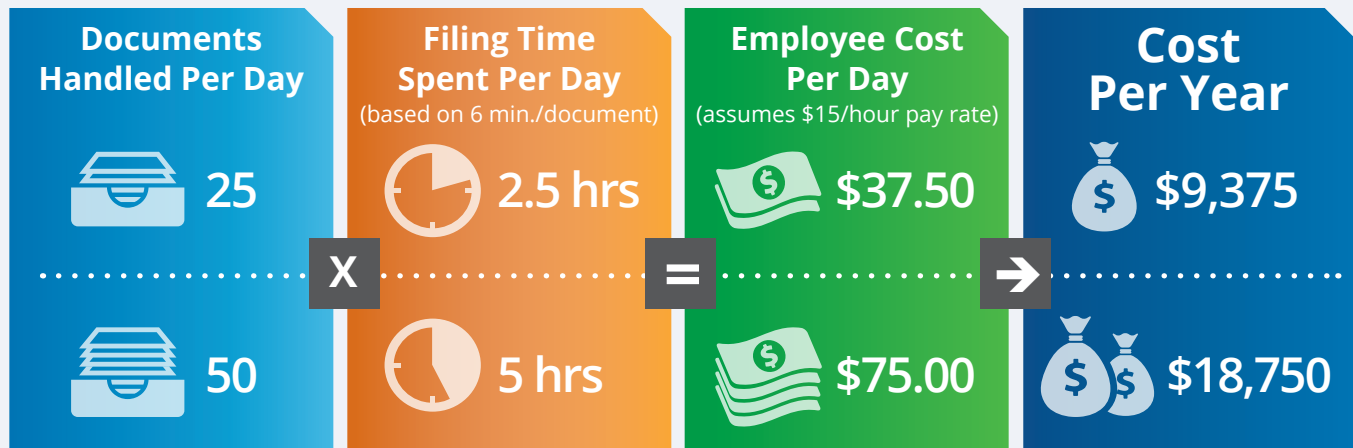
Today's Electronic File

Going paperless and using technology to create, file, and send electronic files increases customer "portability". Information, including digital photos, is quickly and securely transferred between carriers, company websites, client files in the HawkSoft management system, and your client.

- No more hunting for files
- No more outdated information from hard copy files
- No more postage costs incurred mailing hard copies for signature

The Cost of a Paper File*

Paper filing and document retrieval is time consuming, inefficient, error-prone, and costly.



Automating could save you **\$18,750** a year!

* Assumptions: Average filing time per document is 6 minutes; employee pay is \$15/hour; 250 working days per year.
Source: 2011 Price Waterhouse Study



Increase Retention and Customer Satisfaction

Automation, like [carrier downloads](#), allows your staff to service customers faster and more accurately, increasing customer satisfaction. Access to a complete history of clients in a few clicks helps agents respond to clients faster and become trusted advisors. This strengthens relationships, credibility, and retention.

- Answer questions more quickly
- Easily identify cross-selling opportunities
- Remember key customer information, like birthdays and prior insured vehicles



Reduce E&O Exposure

HawkSoft's self-documenting [Action Menu](#) automatically builds a documentation trail of every client interaction, creating detailed notes that can be easily generated into history reports. Thorough recordkeeping reduces your agency's E&O exposure and streamlines operations.

- No more lost post-it notes
- Automatic reminders
- Find and correct problems before the insured calls
- More timely and accurate information



Increase Sales Opportunities

Measure your agency's performance through [Agency Intelligence](#), an advanced reporting suite that is part of HawkSoft's core system at no extra cost. This powerful data analysis engine provides insight to key business metrics for sales, operations, and top performers.

- Easily determine what's working and not working in your marketing sales, retention, and production strategies
- Expose and assign opportunities for account rounding, cross-selling, and sales pipeline forecasts
- Increase customer contact through mass mailing of form letters (i.e. renewals, birthday mailings)



Increase the Value of your Agency

Automating agency processes leads to more effective and efficiently managed business — two key factors that lead to a higher valuation of your business.

- Agencies that use automation have higher values at the time of sale or when applying for credit
- Agencies that use automation gain increased work productivity equivalent to an extra 1.4 employees per 1000 customers
- Consolidating account management, document management, and opportunity management into ONE system increases efficiency and reduces costs