HawkSoft User Group

EMBRACING TECHNOLOGY TOGETHER

HUG Webinar

One Agent's View: HawkSoft 6 Logs, Tags & Tasks

Aug 21, 2024 | 12:00PM CT

HAWKSOFT

HAWKSOFT USER GROUP (HUG)

Have questions... contact us!

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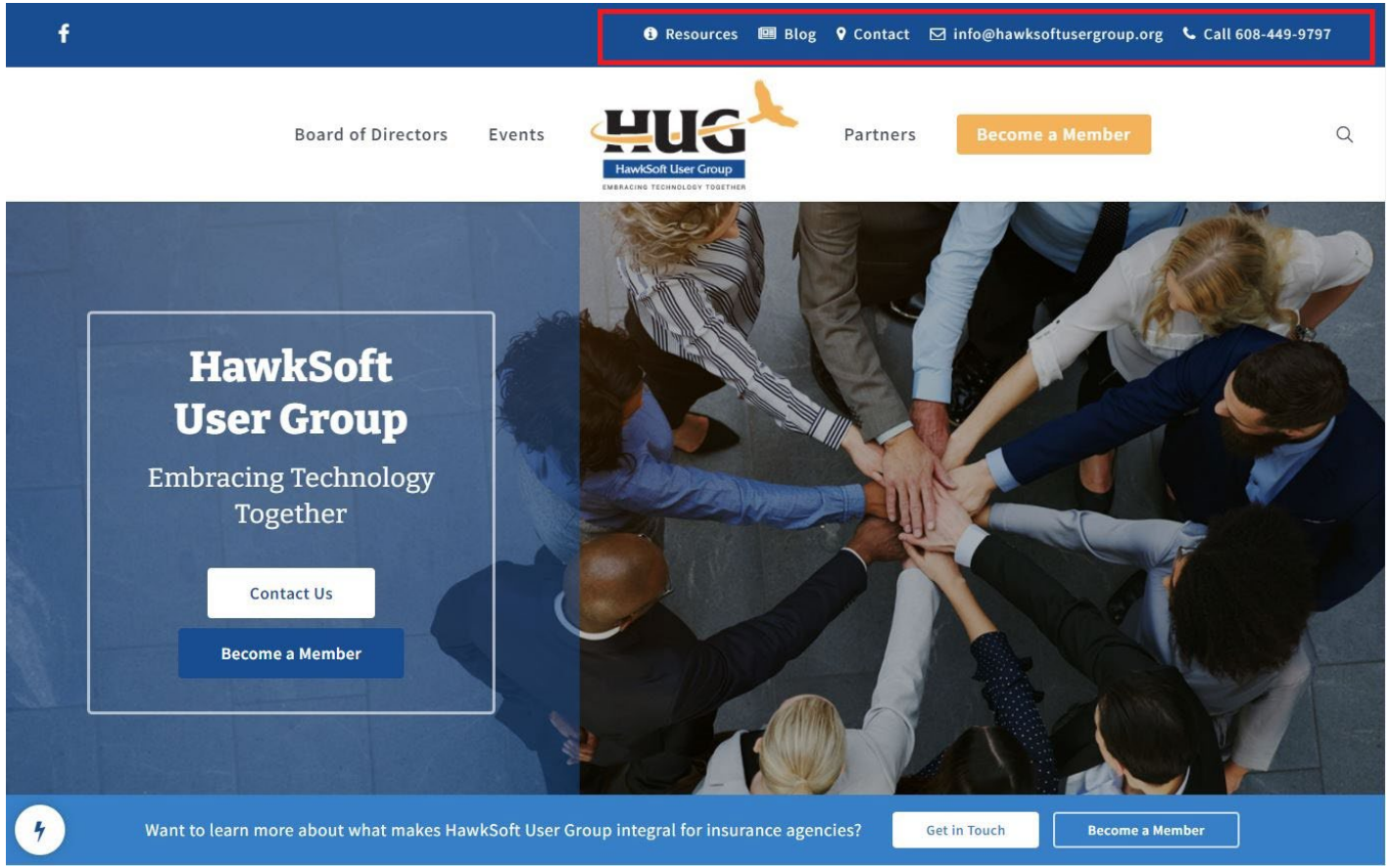
HUG WEBSITE

http://hawksoftusergroup.org/



You're already a member, don't forget to enjoy the benefits!

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HUG FACEBOOK PAGE

Over 2,700 members!

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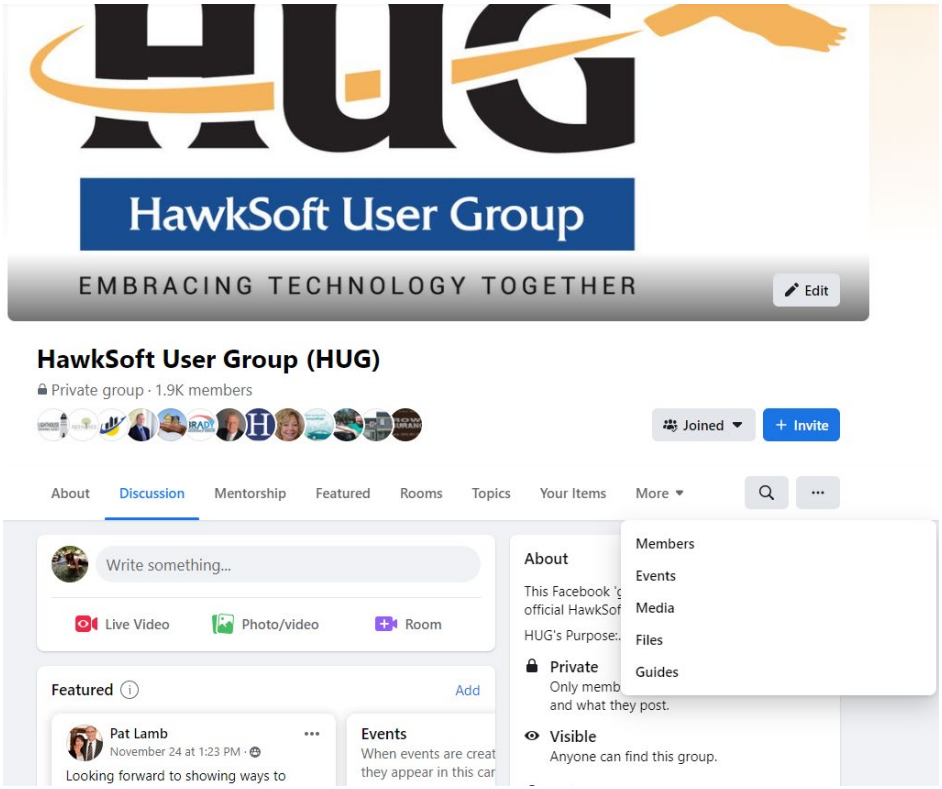

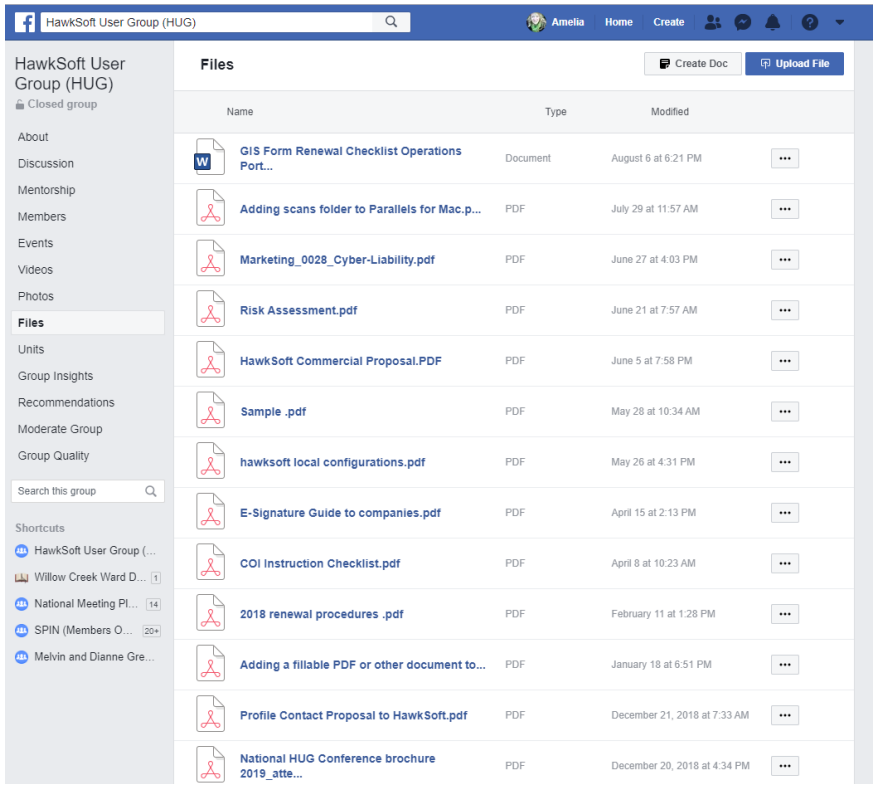

Fall Regional Meetings

One meeting left - one day educational event. You can attend any meeting!

- Thursday, September 5 – Philadelphia, PA
- Thursday, September 12 – Columbus, OH
- Thursday, October 3 – Canby, OR (HawkSoft Office)
  Michelle will be at this one! Come say hello!
- Thursday, October 17 – Arlington, TX
- Thursday, October 24 – Newport Beach, CA
- Tuesday, October 29 – Atlanta, GA
- Thursday, November 7 – St. Petersburg/Tampa, FL

https://hawksoftusergroup.org/regional-meetings/

Hawk's Nest – Owner/Executive Retreat



https://hawksoftusergroup.org/hawks-nest/

2025 NATIONAL CONFERENCE

HUG AT SEA 2025 BAHAMAS CRUISE

CRUISE ORLANDO TO THE BAHAMAS

APRIL 14 - 18, 2025

APRIL 13 (PRE-CRUISE EVENT ON-LAND)

REGISTRATION DEADLINE: JANUARY 31, 2025



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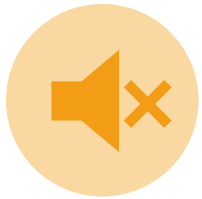
Cruise Registration Website: https://www.theeventregistration.com/HUG2025cruise

HOUSEKEEPING



- During the webinar, participants will be muted. Please ask your questions using the Q & A feature, NOT the chat.



- If you are having difficulties hearing the speakers, consider calling in on the phone for the audio rather than listening via your computer.



- We are recording the webinar and you will be emailed a link to the recorded webinar within 24 hours.

Hawksoft is online…… Ryan Reese

Ryan is one of the product owners here with us from Hawksoft and he'll be available to add some help and insight on some of the topics we'll be talking about today.

Welcome Ryan!

TODAY'S PRESENTERS

Thank you to...



Michelle Hancock
PNW Insurance
Puyallup, WA
michelle@pnwinsurancegroup.com

“One Agent’s View” Series

Welcome

Logs, Tasks, & Tags

Second in our new series

We are looking for other agents to present in the future.
Please reach out if interested! michelle@pnwinsurancegroup.com
We are currently looking for presenters on;

- Hawksoft 6
- Using AI in the Agency
- Time Management – Efficiency Hacks
- Open to additional ideas and topics

Just my “One Agent’s View”
Some ideas might work, Some might not – but we hope to get your mind stirring on some new ideas!

Don’t worry…. Log Notes are still your old friend

log

['lȯg 'läg]

noun.

: a usually bulky piece or length of a cut or fallen tree

: the record of the rate of a ship's speed or of her daily progress

: a record of performance, events, or day-to-day activities

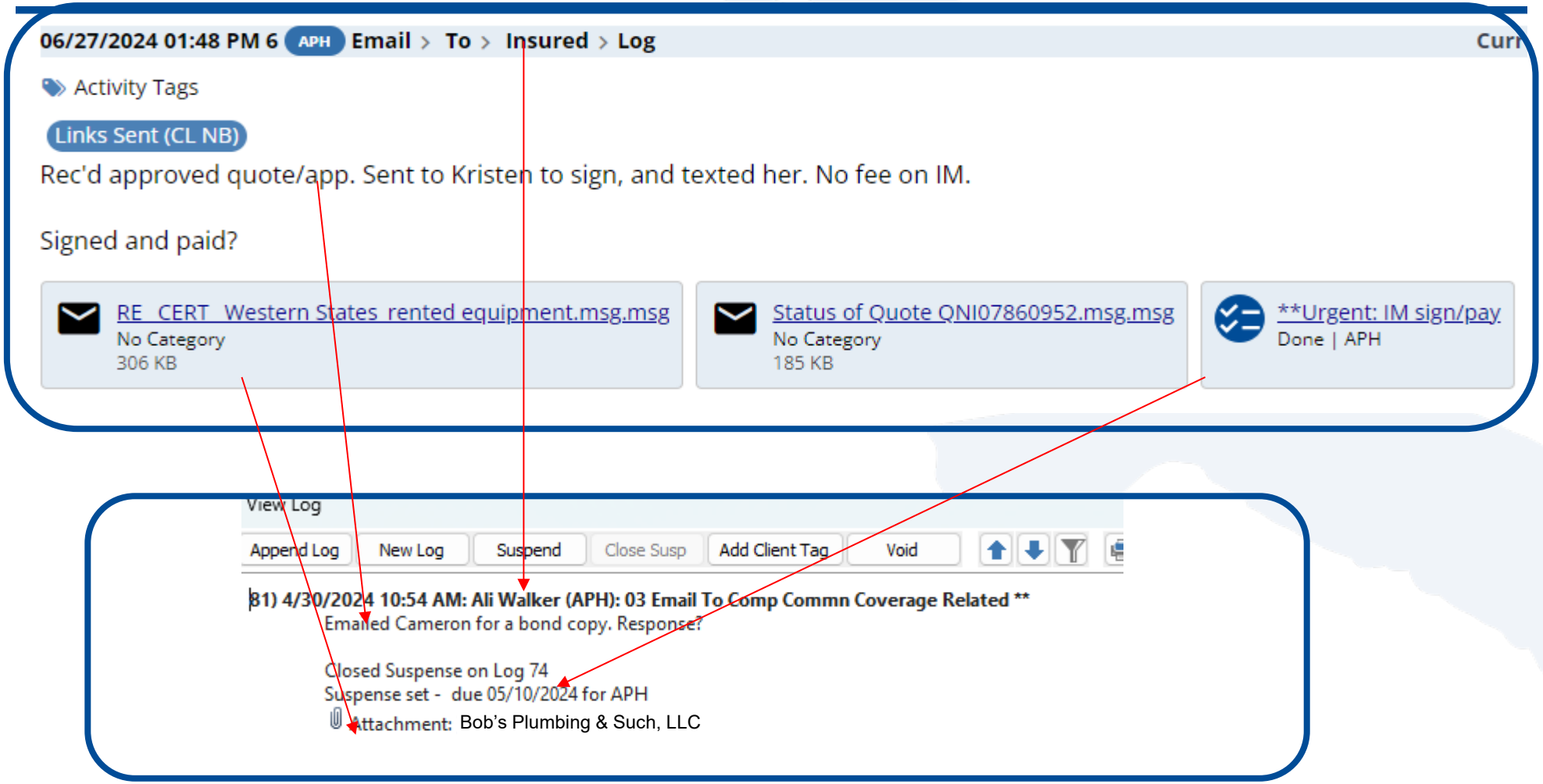
:an insurance agents best defense and CYA in file documentation

Log Notes
The primary function of a log note in our agency is to document conversations, communications and actions needed concerning any client file.

That does not change in Version 6

The purpose of a log is to document what happened in a file
The purpose of a task is a reminder of a thing that needs to happen on a future date

Log in HS5 v HS6

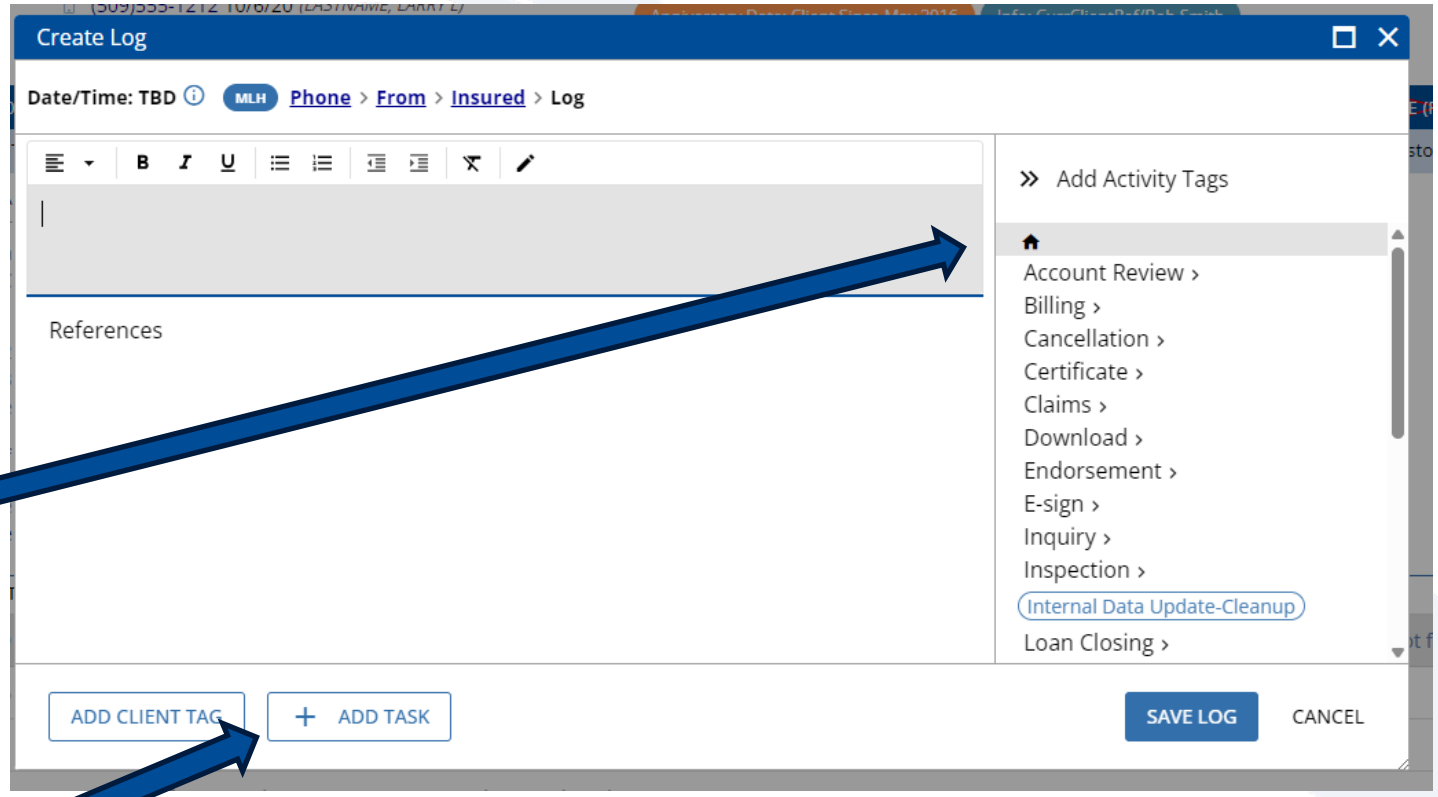


The Flow....

Enter your log note – still first, still documents file

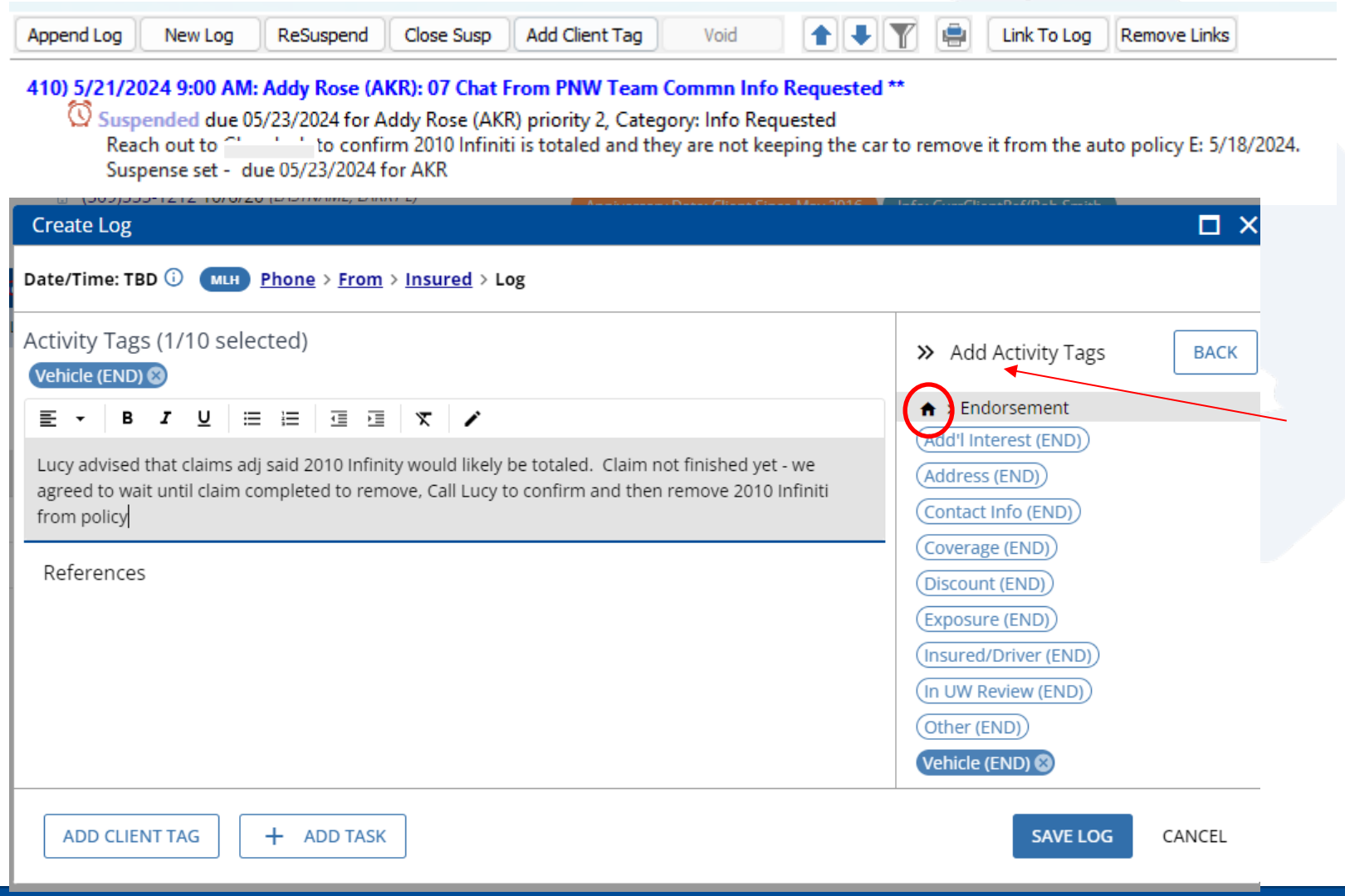
Add your tag New Feature, another click but adds value

Add your task – previously known as suspense but still just a reminder to do a thing / follow up



Pro Tip – Pick a flow that you train your agency on. This should help improve the use of the new features.

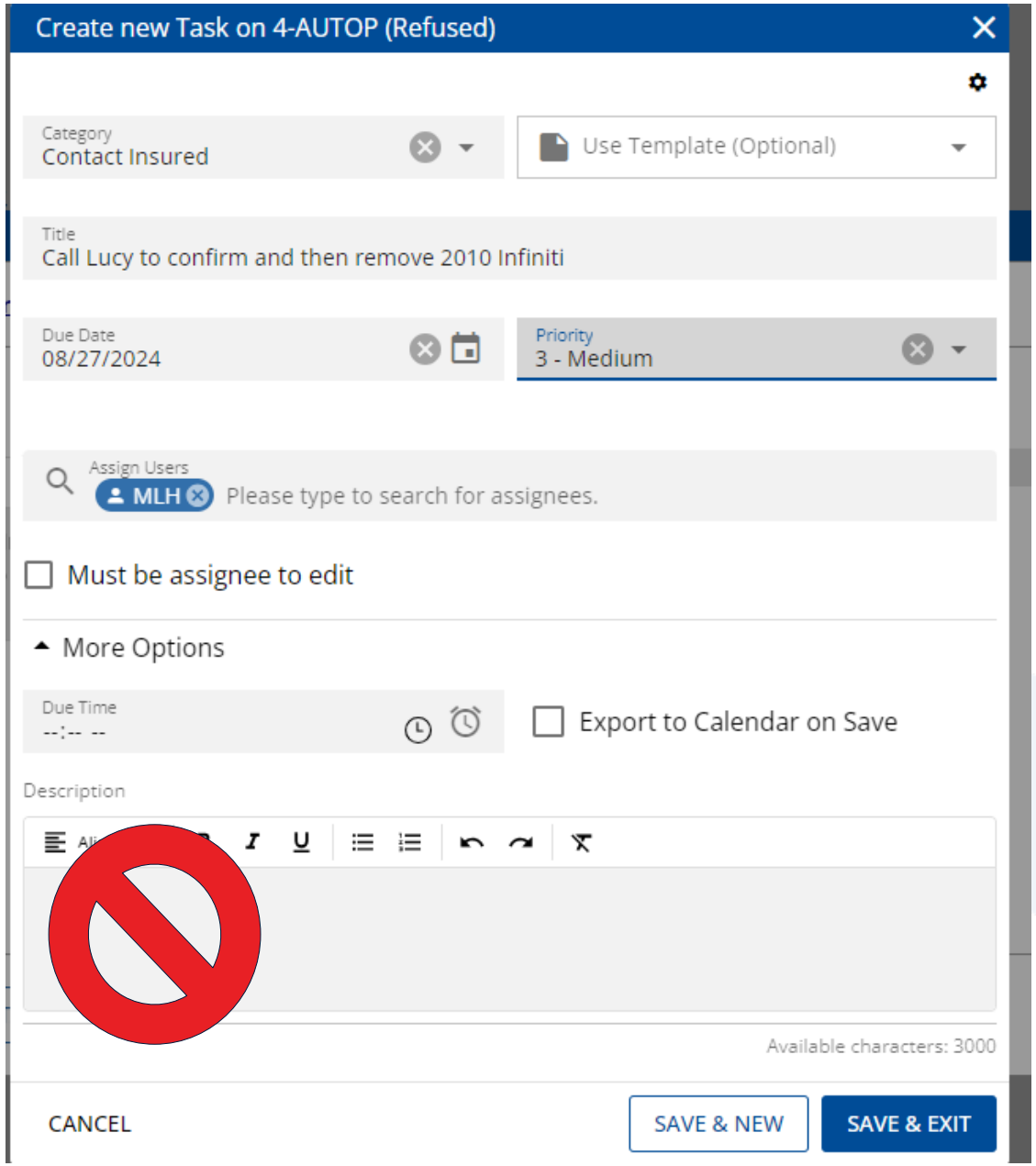
Logs, Suspense and, my new friend, Tags



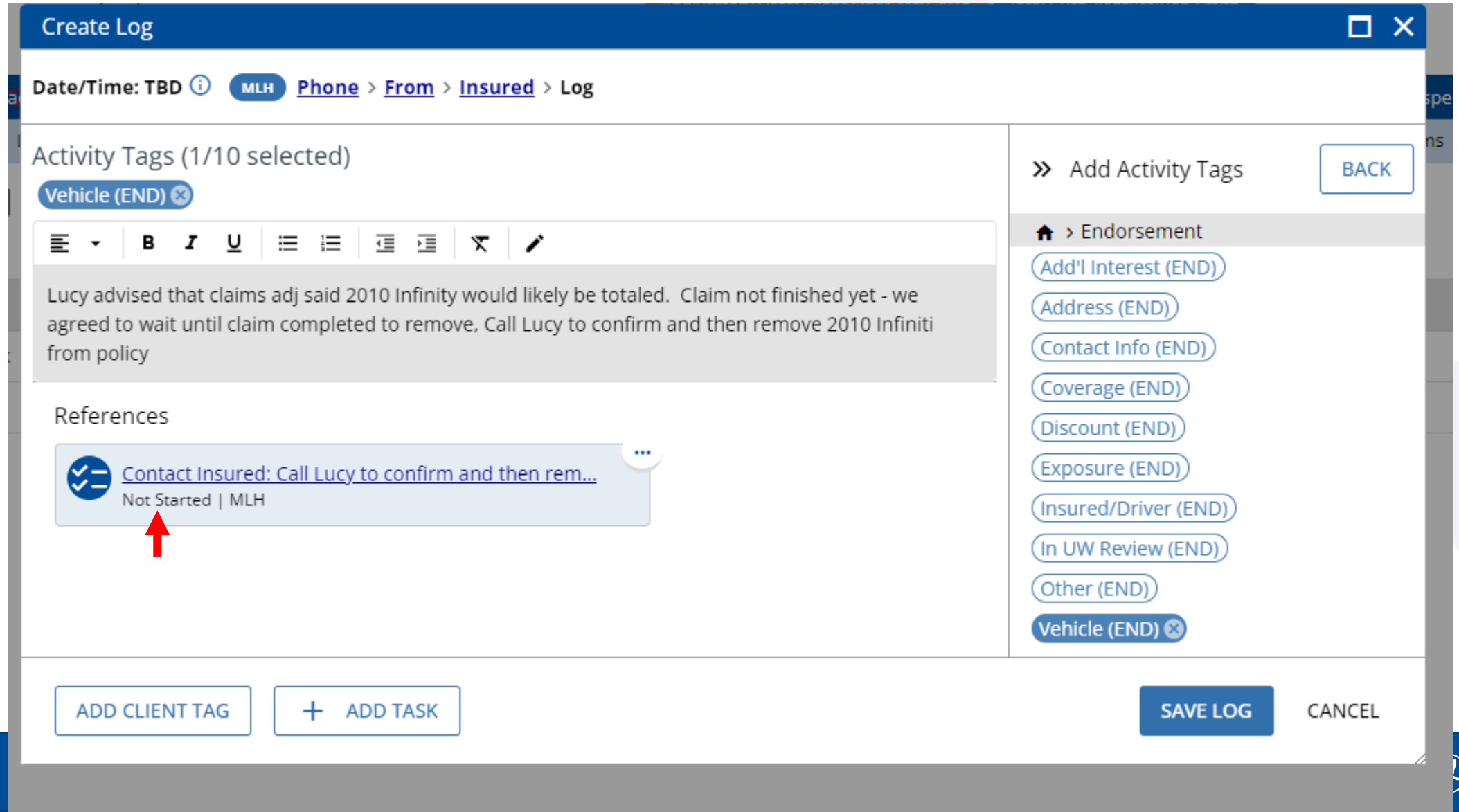
Pro Tip:
Copy paste the action item from log note to be your task title

Tasks

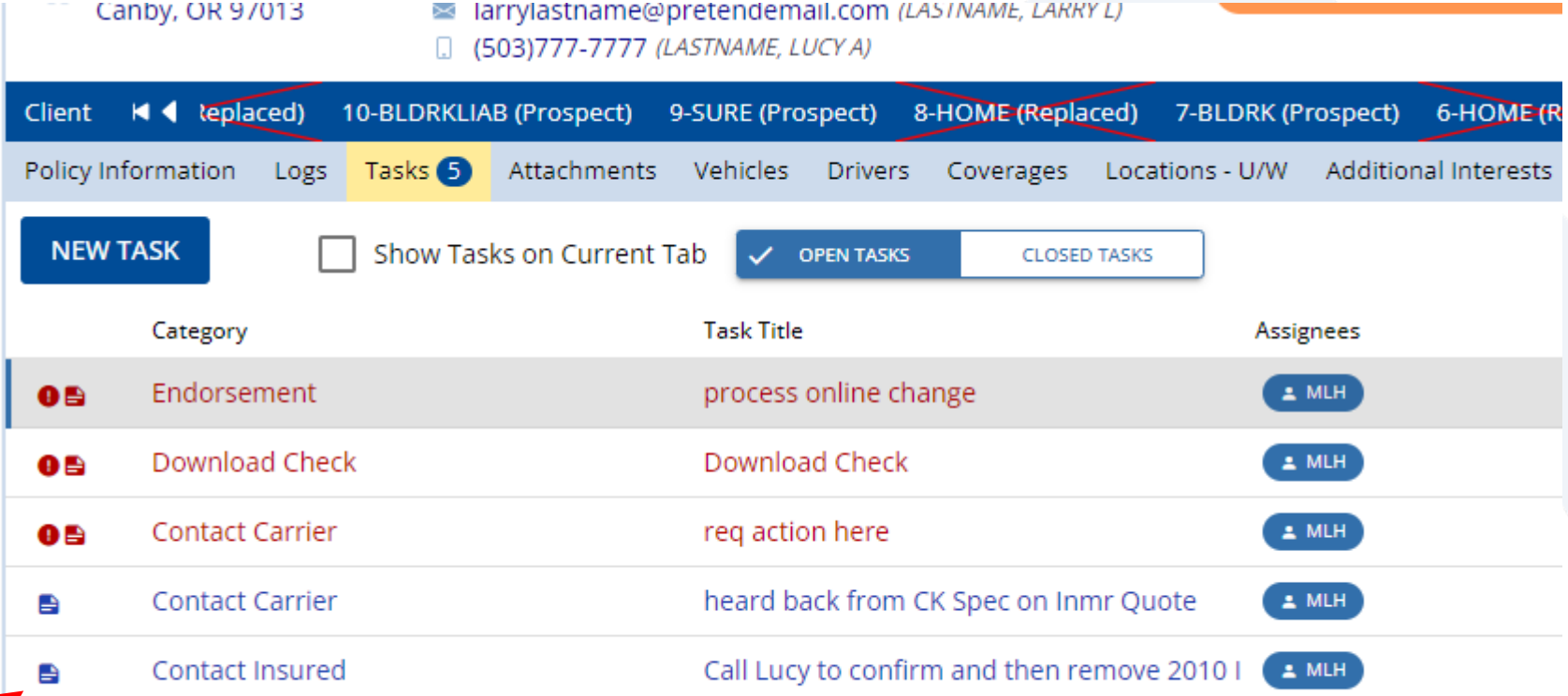
Is the place to set reminders of what needs to be done.
Is not a place to document communications that you would have put in log in v5.
Just a reminder feature
It is suspense, but called a task. Just a new name.



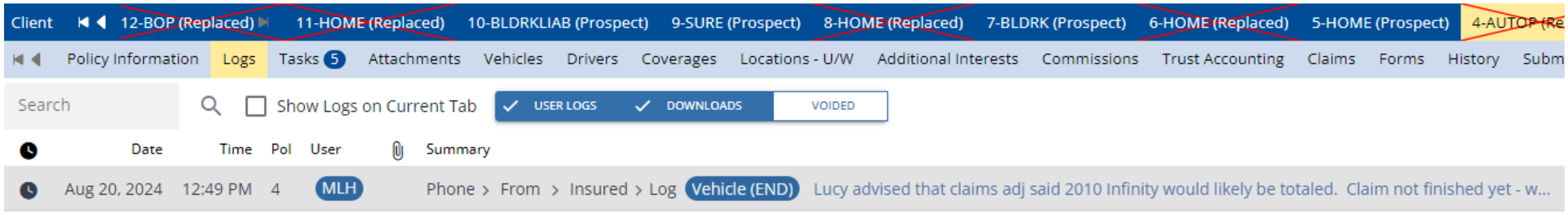
How it looks in the end



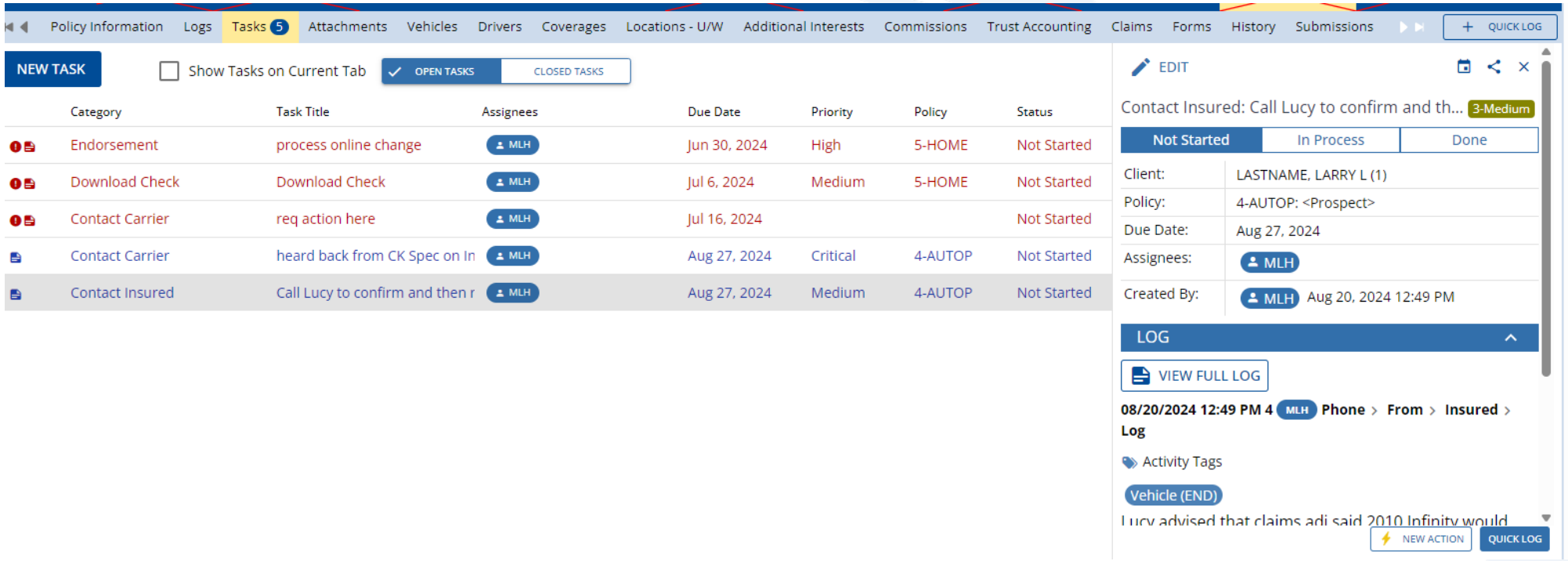
Sample of Task List in client view



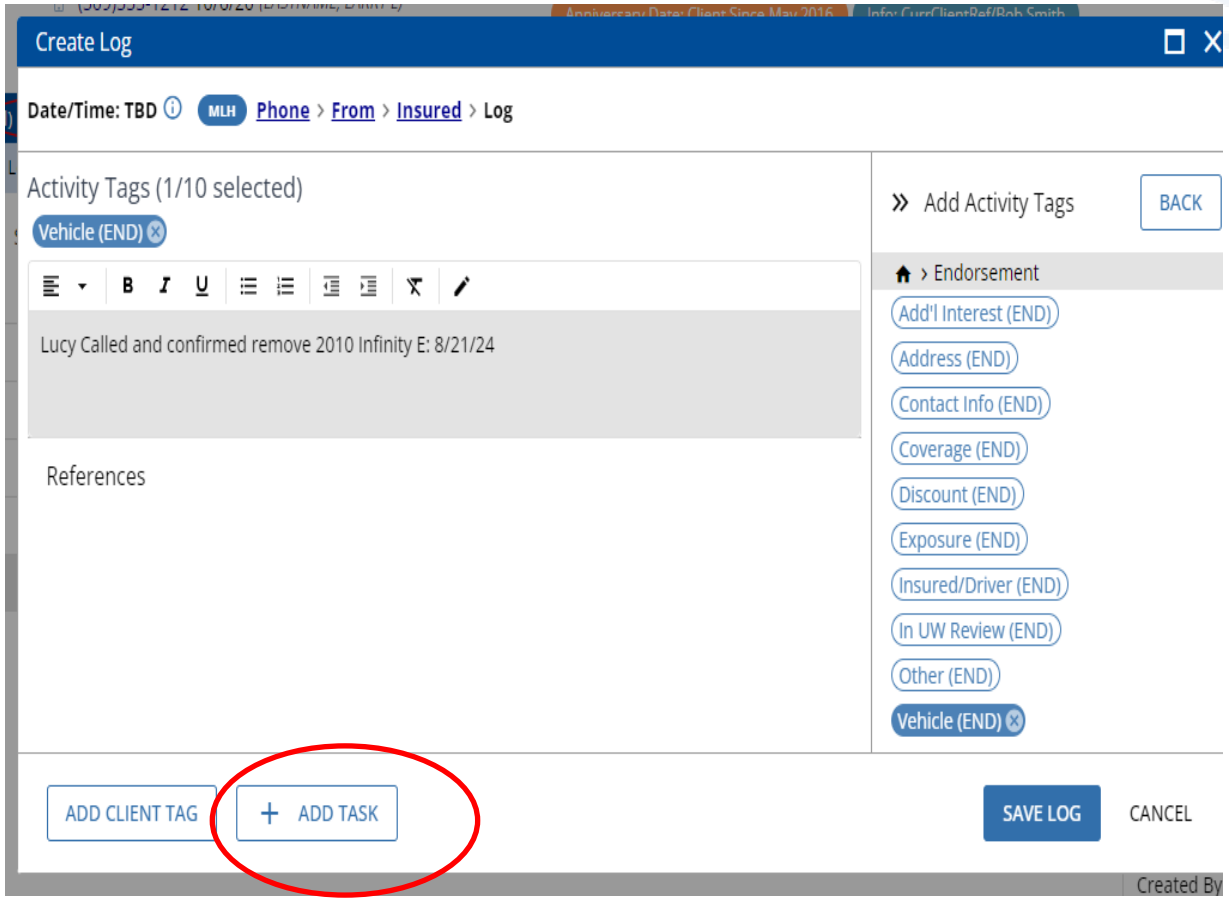
Glance at log screen view

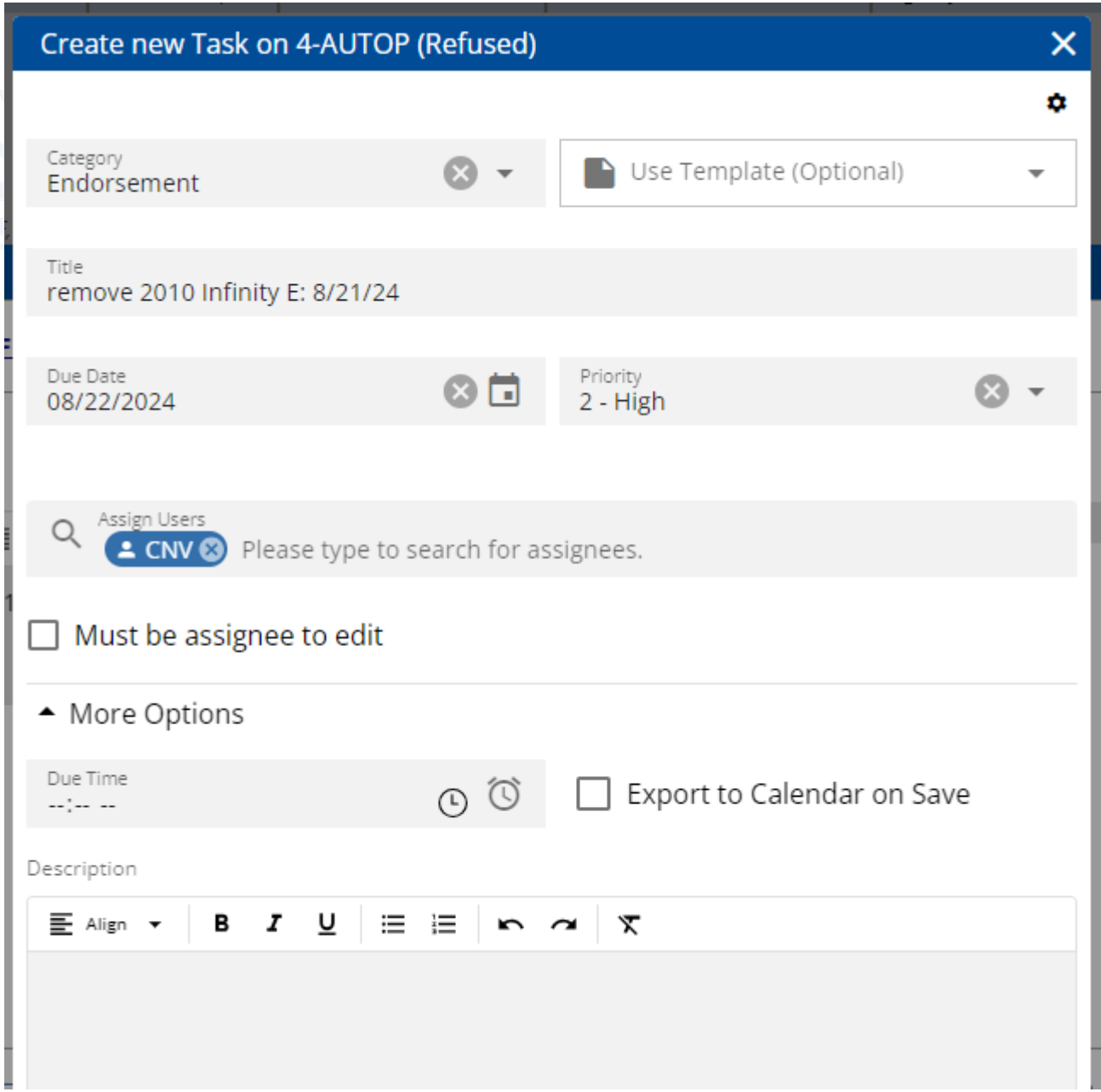


Closing a Task...



- This view is from the task list on a client, we click the open task, click done, click new action, then when Lucy called back we'd use the standard action menu flow of Phone, From, Insured, - Lucy confirmed to remove vehicle.


Create Log
Date/Time: TBD
MLH
Phone › From › Insured › Log
Activity Tags (1/10 selected)
Vehicle (END)
Lucy Called and confirmed remove 2010 Infinity E: 8/21/24
References
Add Activity Tags
BACK
› Endorsement
Add'l Interest (END)
Address (END)
Contact Info (END)
Coverage (END)
Discount (END)
Exposure (END)
Insured/Driver (END)
In UW Review (END)
Other (END)
Vehicle (END)
ADD CLIENT TAG
+ ADD TASK
SAVE LOG
CANCEL
Created By


Create new Task on 4-AUTOP (Refused)
Category
Endorsement
Use Template (Optional)
Title
remove 2010 Infinity E: 8/21/24
Due Date
08/22/2024
Priority
2 - High
Assign Users
CNV
Please type to search for assignees.
Must be assignee to edit
More Options
Due Time
--:-- --
Export to Calendar on Save
Description
Align

Next Log | Previous Log | Print | Share | ×

08/21/2024 07:22 AM 4 MLH **Phone > From > Insured > Log** Current Log

Activity Tags

Vehicle (END)

Lucy Called and confirmed remove 2010 Infinity E: 8/21/24

Endorsement: remove 2010 Infinity E: 8/21/24
Not Started | CNV

08/20/2024 12:49 PM 4 MLH **Phone > From > Insured > Log**

Activity Tags

Vehicle (END)

Lucy advised that claims adj said 2010 Infinity would likely be totaled. Claim not finished yet - we agreed to wait until claim completed to remove, Call Lucy to confirm and then remove 2010 Infiniti from policy

Contact Insured: Call Lucy to confirm and then rem...
Done | MLH

ADD CLIENT TAG | NEW TASK | APPEND TO LOG | + QUICK LOG | NEW ACTION | CLOSE

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REMEMBER TO PAUSE FOR QUESTIONS

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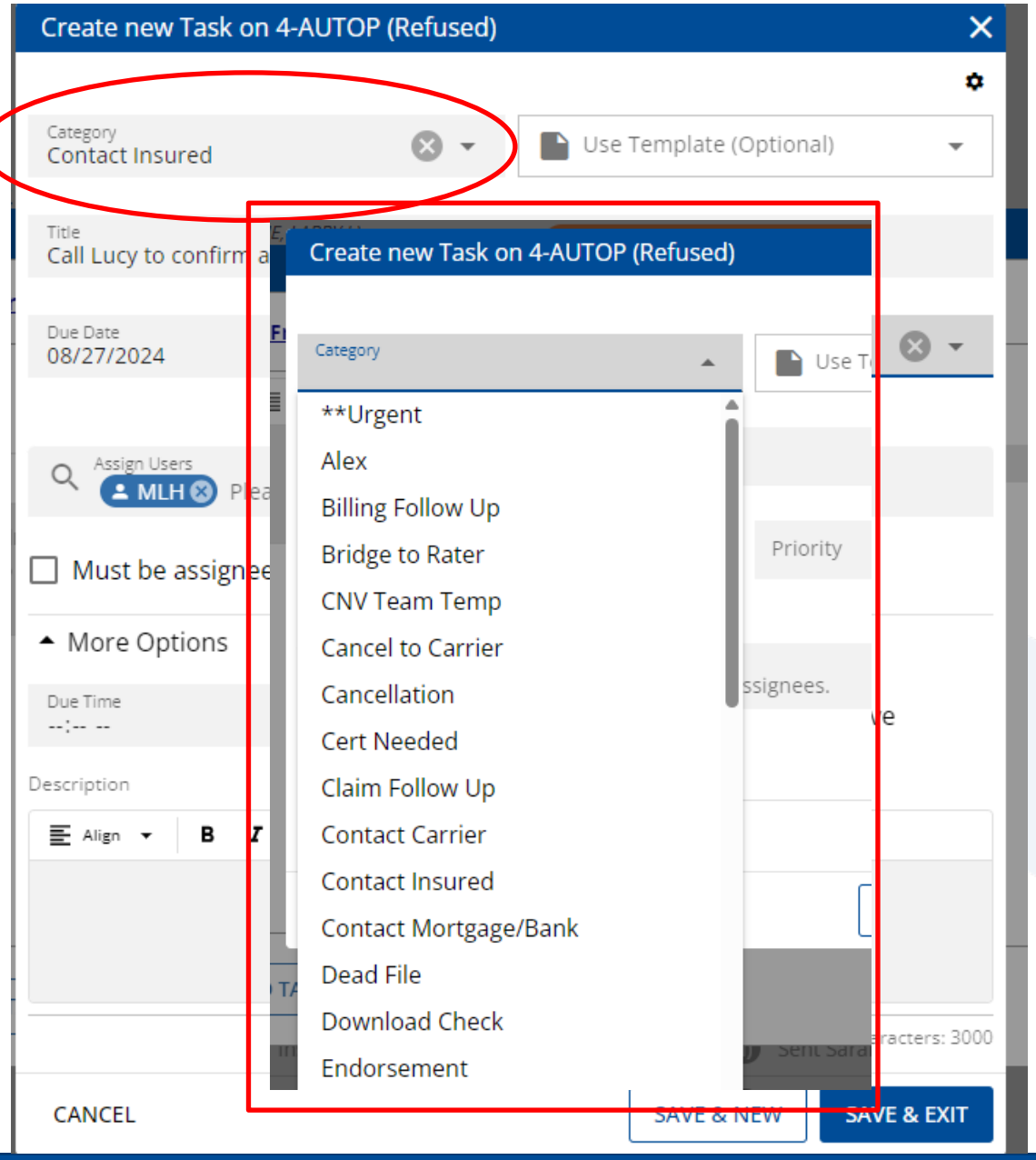
This feels like a great spot to do that….

Anyone?

Task Categories

Options within the task Categories – Help with organize flow of action items – and provide "at a glance" info in task center and task list.
This was in HS5 as well.
We've used for many years



Task Categories

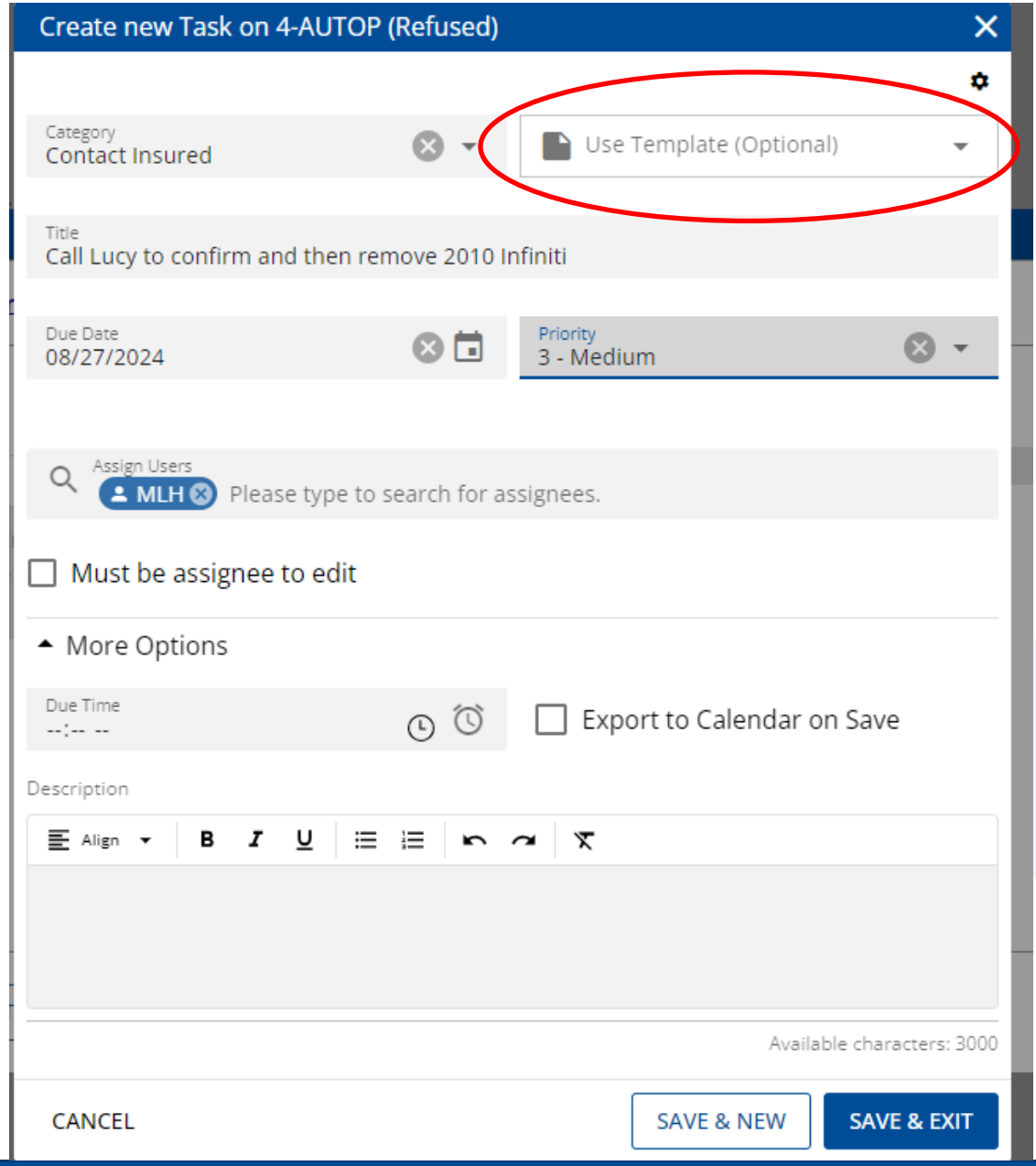
Helps organize workflow, can also organize by carrier, priority, date, etc

CNV - CLIENT TEAM (28)

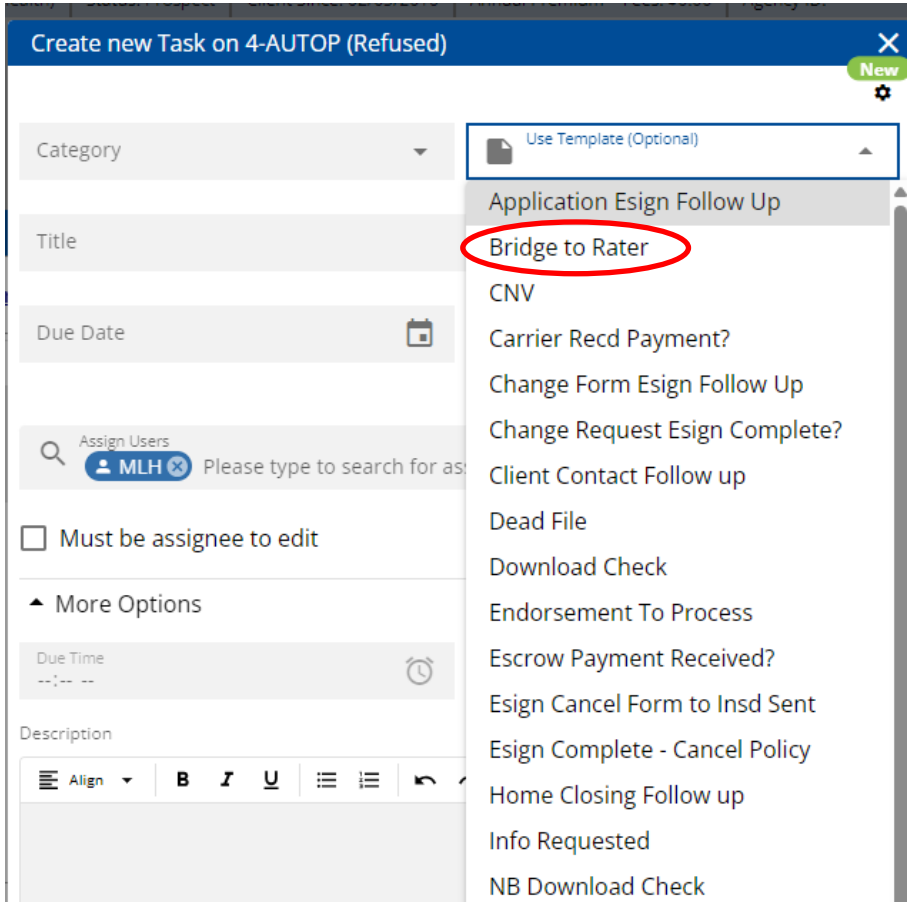
Category	Task Title	Due Date	Priority	Client	Carrier
Billing Follow Up	Payment in full received?	Aug 20, 2024	2-High	M	Cochrane & Co
Billing Follow Up	Payment Received?	Aug 20, 2024	3-Medium	Br	Proper Insurance
Esign	Cancellation/download form/process	Aug 20, 2024	3-Medium	Di	Progressive
Endorsement	F/U 2024 Avenger Trailer added eff 08/16/2024	Aug 20, 2024	2-High	De	Safeco
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	M	Foremost Insurance
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	Ng	Capital Insurance Gro
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	M	Allied - Nationwide Gr
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	Or	Allied - Nationwide Gr
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	Sc	Allied - Nationwide Gr
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	M	Safeco
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	Th	Safeco
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	M	Travelers (OR)
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	Se	The Travelers Compa
Endorsement	Endorsement Download	Aug 20, 2024	3-Medium	M	The Travelers Compa
Sendout	Send out statement	Aug 20, 2024	2-High	Par	The Travelers Compa

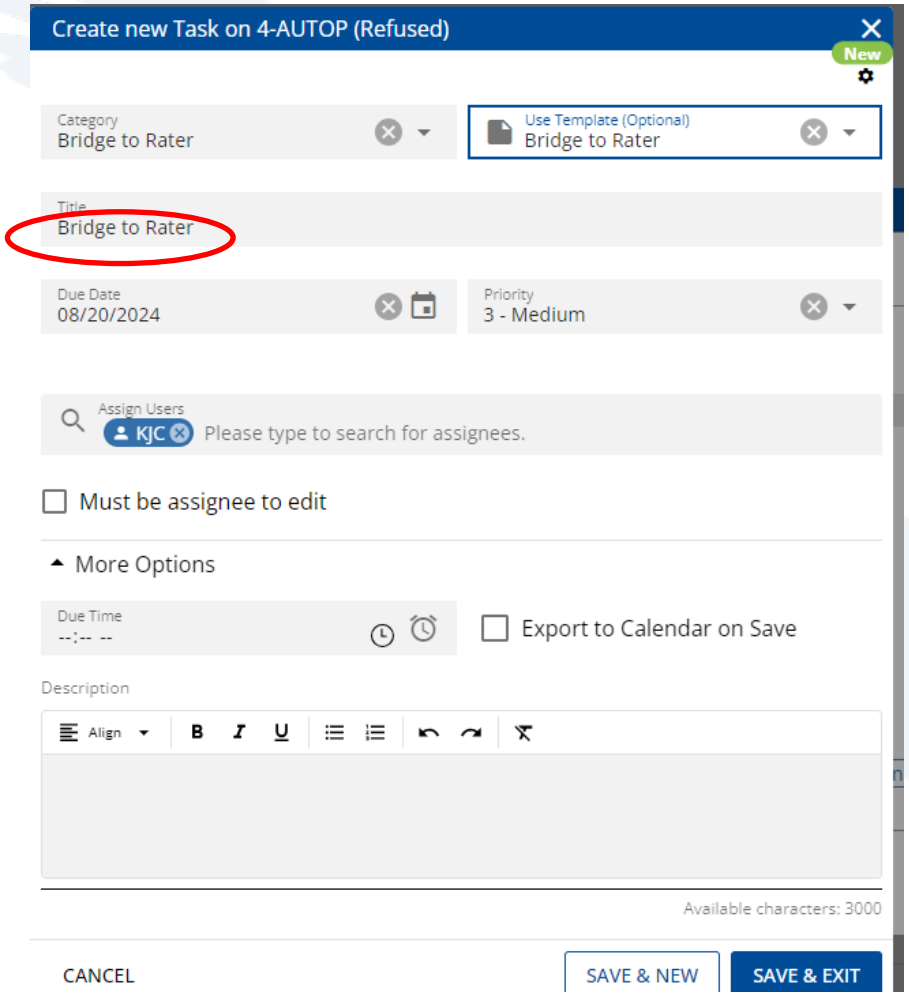
Task Template

Allows you to set up common tasks with standard timeframe, priorities and people.



Task Templates





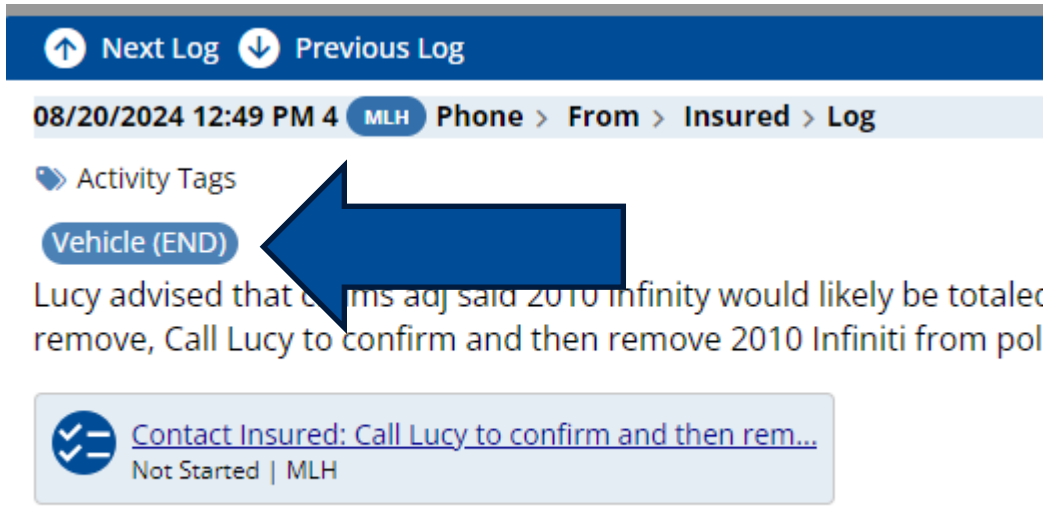
Task Center

Pers Lines Acct Manager Tasks Sample

LAG - LISA GUPTON (12)

	Category	Task Title	Due Date ↓	Priority	Client
	Contact Insured	Is home sold? If yes, cancel policy w/NW	Aug 20, 2024	2-High	Rod
	NB Gathering Info	Info in to quote COC?	Aug 20, 2024	1-Critical	Bar
	NB Gathering Info	FU	Aug 20, 2024	2-High	Car
	Info Requested	FU on addtl info	Aug 20, 2024	2-High	Kuh
	Bridge to Rater	Bridge to Rater (Done w/ Home & Auto)	Aug 20, 2024	2-High	Llev
	Bridge to Rater	Bridge to Rater (Done w/ Home & Auto)	Aug 20, 2024	2-High	Kur
	Bridge to Rater	Bridge to Rater (Done w/ Home & Auto)	Aug 20, 2024	2-High	Jam
	**Urgent	FU on loan closing	Aug 20, 2024	1-Critical	Kha
	Download Check	Download	Aug 20, 2024	3-Medium	Isak
		Nicky called to update binder. pls call back	Aug 20, 2024	2-High	Ros
	Endorsement	exclude max	Aug 19, 2024	1-Critical	Rub
	Rewrite	Need ext photos to rewrite	Aug 19, 2024	1-Critical	Hicl

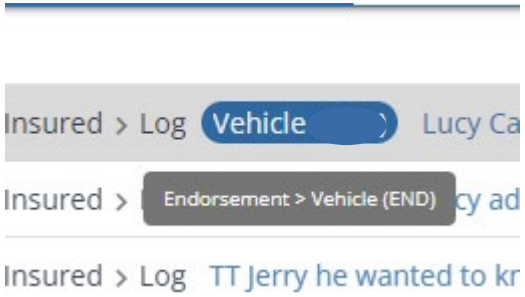
Time for some “Tag Talk”

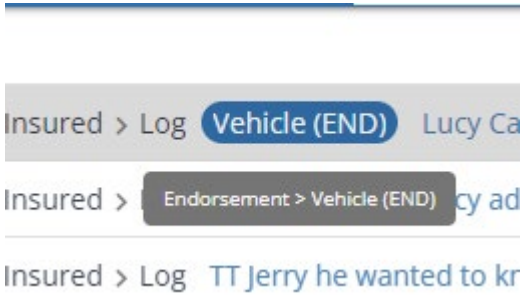


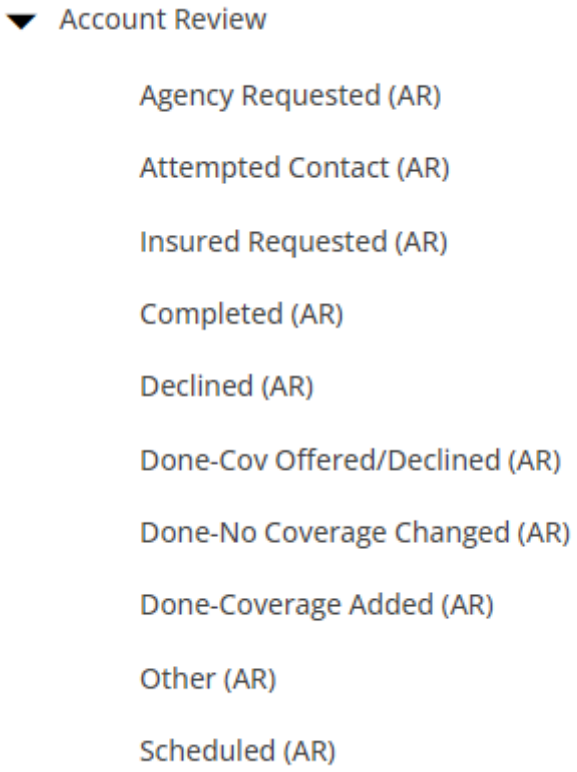
Tags – What's with the parenthesis?

We originally set up several tags without them. Then we saw the problem!
Without the "context" provided in parenthesis, you'd have to move your mouse up to hover over to see the full track.

If my tag just said "Vehicle" did they want a quote, did they have a claim on a vehicle, did they buy a vehicle? So we want the context to show. Almost all of our tags have the context after the main word in parenthesis.







Tags - More Clicks? Less Clicks?

Admittedly – some parts of the HS 6 require new clicks.

This is being worked on and streamlined, some have even changed since we went live

However, some of these new clicks save time elsewhere and provide insight into your clients, team & workflow.

This is the case with Tags….

Tags

By design are to state subject on the log. What was the main topic or topics related to the log.

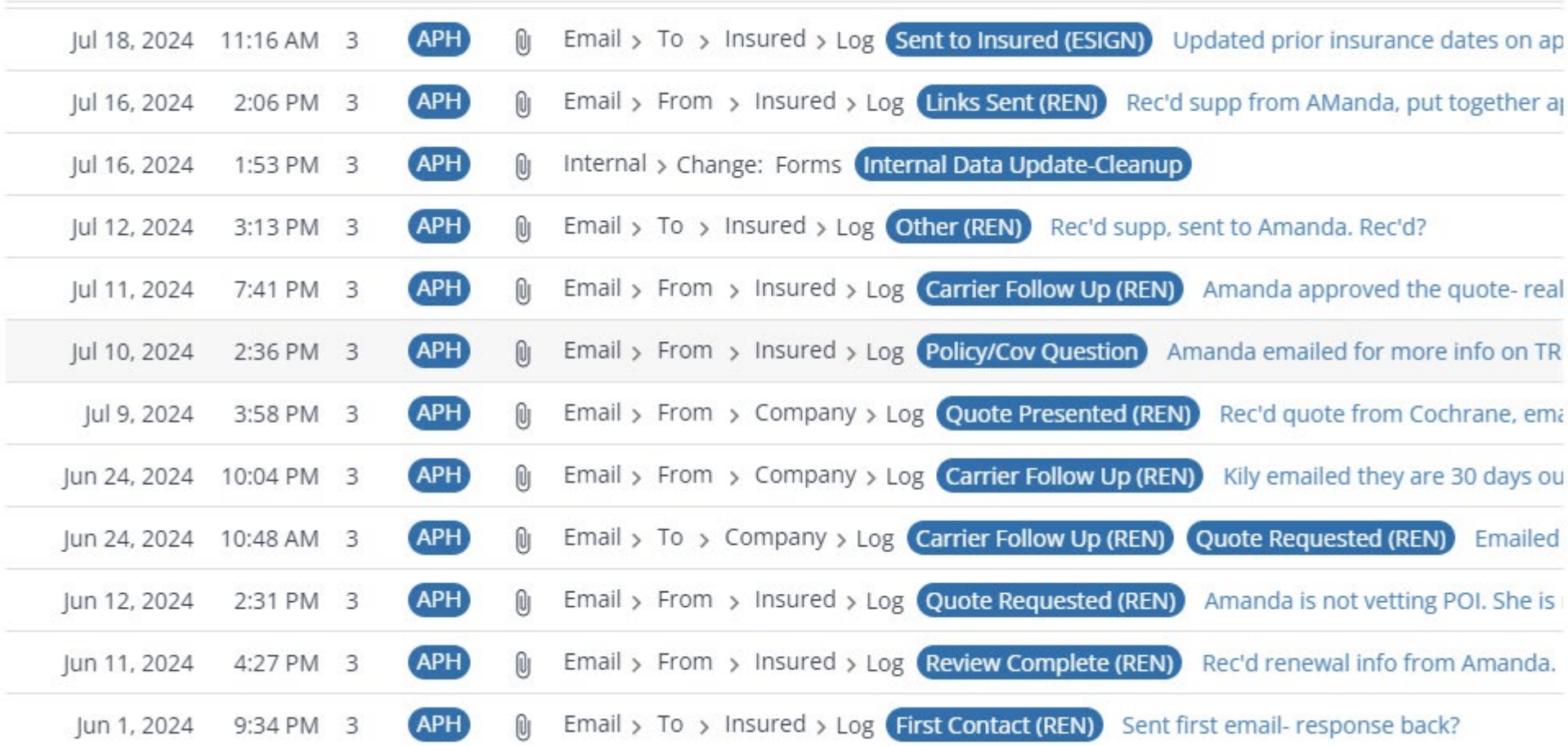
Warning: I’m about to make a shameless plug for regionals!!

Back to our regular programing;

We reviewed the options and decided we wanted more

Tags

Log Note View – Allows easy view of what is happening on account.



REMEMBER TO PAUSE FOR QUESTIONS

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This feels like a great spot to do that….

Anyone?

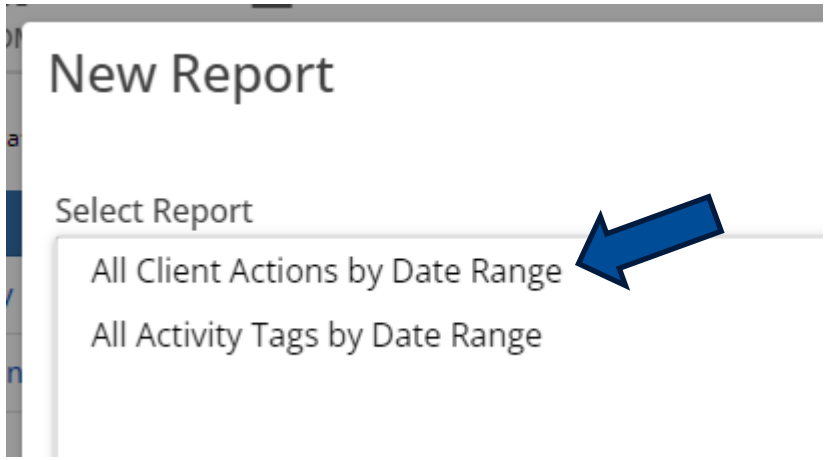
Tags & Reporting

The Data

- Who is doing what – are the right people doing the right things
- A different way to see flow of leads and new business
- Time / Efficiency / Output analysis (look for ways to make things better for your team)

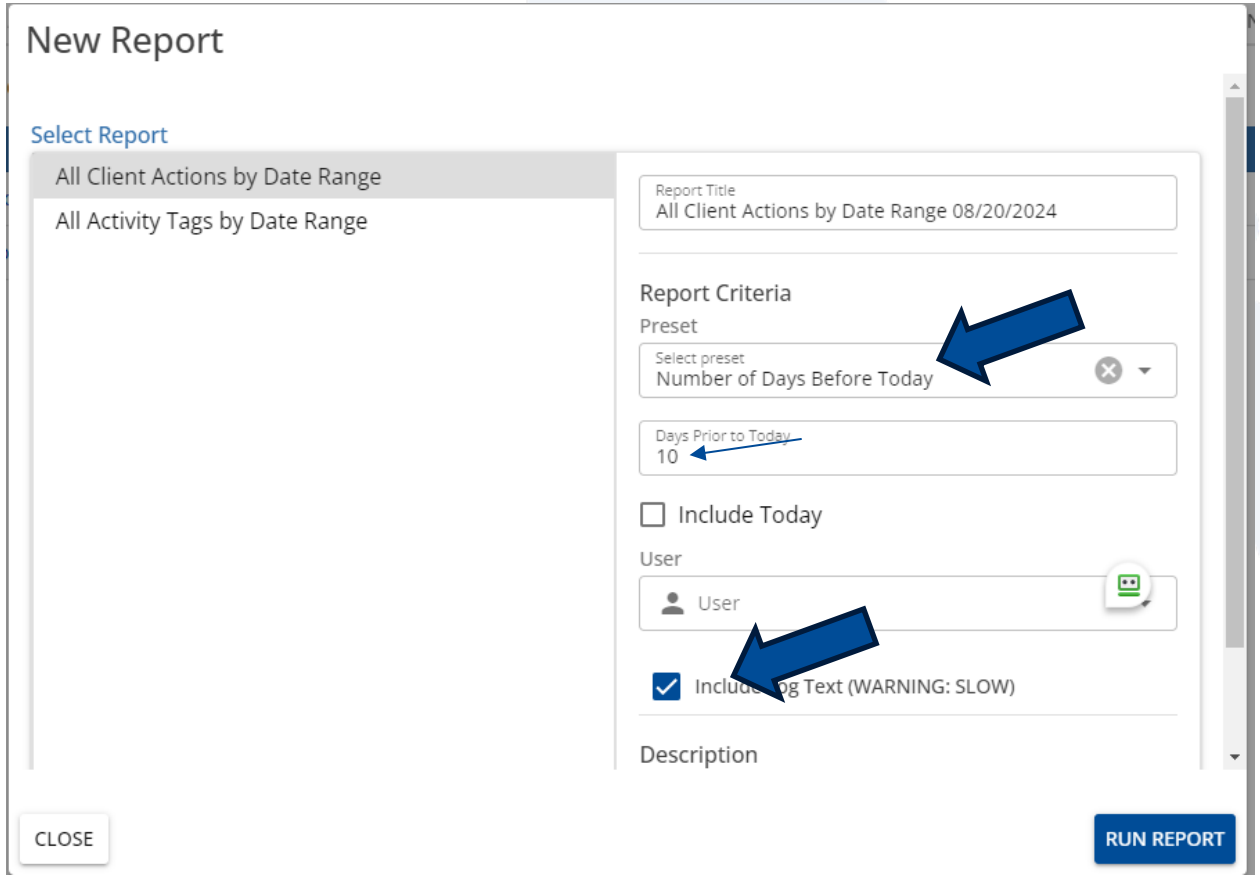
To Run Your Report

Quick Reports – Activity Reports – New Report

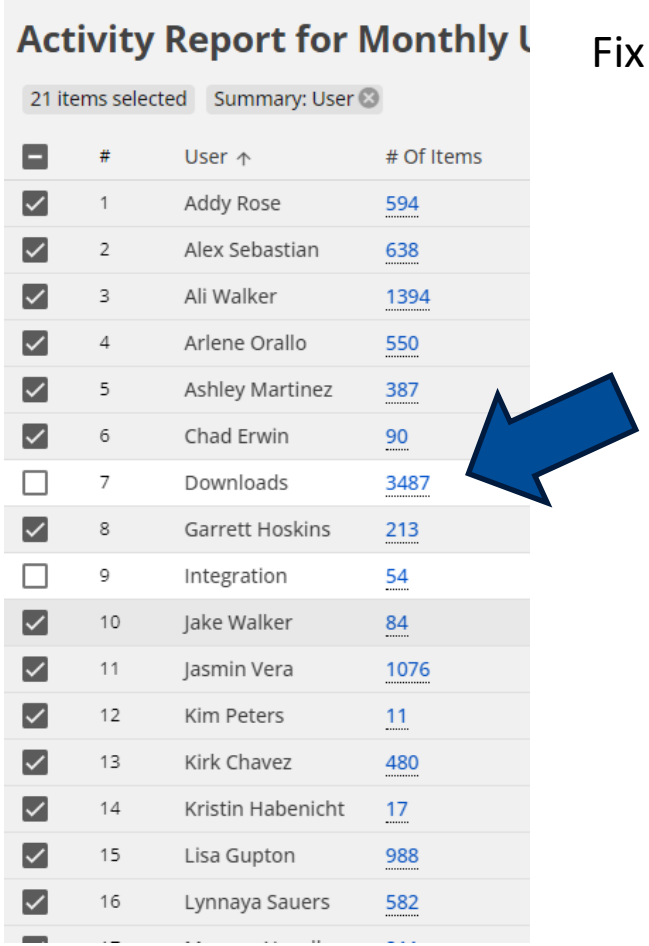


Tags & Reporting

All Actions will help you see who is and isn't using tags – Preset date range allows you to then save this report as a template.



Tag Reporting

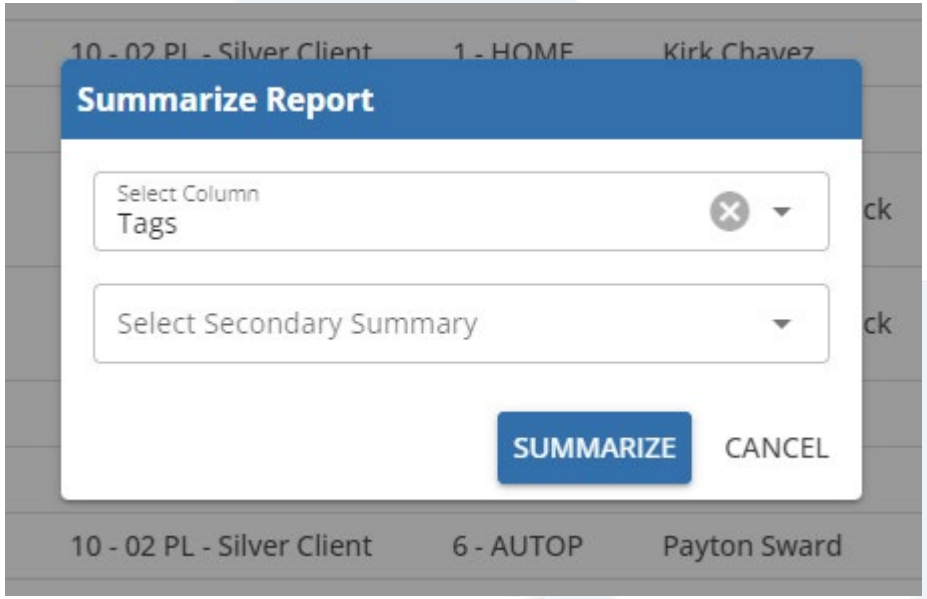


#	User ↑	# Of Items
1	Addy Rose	594
2	Alex Sebastian	638
3	Ali Walker	1394
4	Arlene Orallo	550
5	Ashley Martinez	387
6	Chad Erwin	90
7	Downloads	3487
8	Garrett Hoskins	213
9	Integration	54
10	Jake Walker	84
11	Jasmin Vera	1076
12	Kim Peters	11
13	Kirk Chavez	480
14	Kristin Habenicht	17
15	Lisa Gupton	988
16	Lynnaya Sauers	582

Fix your users to ones you want to see – I remove download and integrations

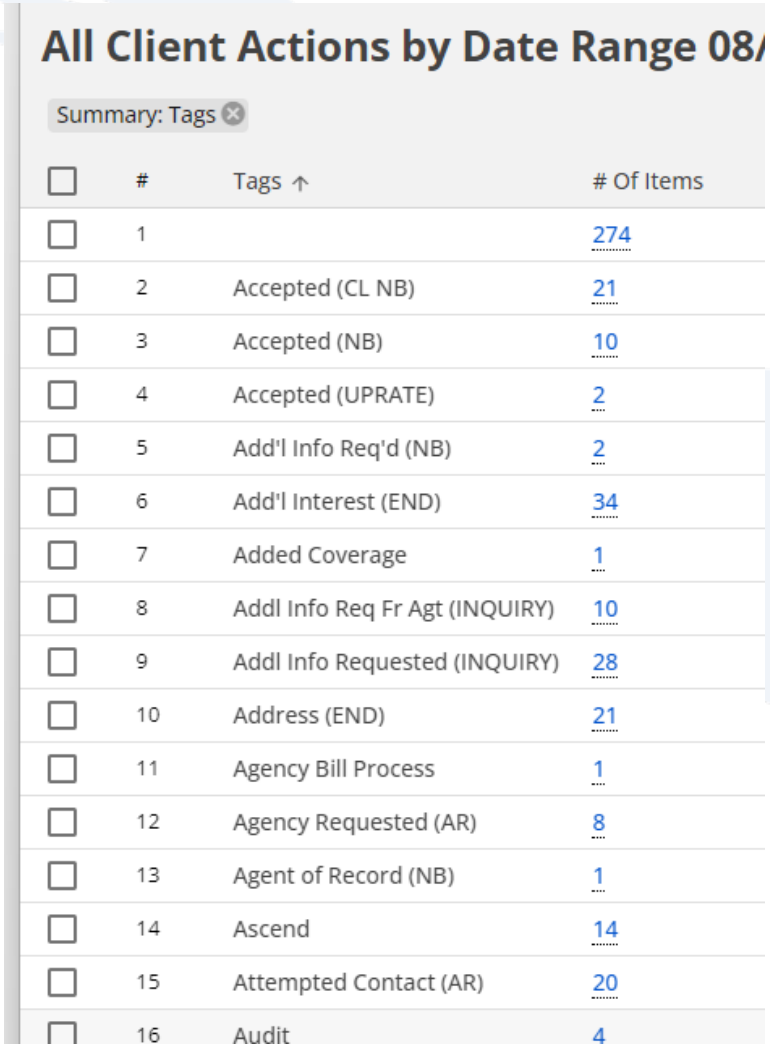
Tags Reporting

- Then Summarize by Tag



Tags Reporting

Here is a sample of how the data comes out



All Client Actions by Date Range 08/

Summary: Tags

#	Tags	# Of Items
1		274
2	Accepted (CL NB)	21
3	Accepted (NB)	10
4	Accepted (UPRATE)	2
5	Add'l Info Req'd (NB)	2
6	Add'l Interest (END)	34
7	Added Coverage	1
8	Addl Info Req Fr Agt (INQUIRY)	10
9	Addl Info Requested (INQUIRY)	28
10	Address (END)	21
11	Agency Bill Process	1
12	Agency Requested (AR)	8
13	Agent of Record (NB)	1
14	Ascend	14
15	Attempted Contact (AR)	20
16	Audit	4

Tags Reporting Magic

- You can use chat GPT to do this work for you… takes under 1 min to get this done
- You can also use excel features to get this done
- This allows a different approach to data analysis for us.

Category	Tags	# of Items
AR	Agency Requested (AR)	16
AR	Attempted Contact (AR)	67
AR	Completed (AR)	12
AR	Declined (AR)	11
AR	Done-Cov Offered/Declined (AR)	4
AR	Insured Requested (AR)	23
AR	Other (AR)	8
AR	Scheduled (AR)	15
BILL	Carrier Refund (BILL)	4
BILL	Change Payment Method (BILL)	13
BILL	Issue (BILL)	22
BILL	Mailed PNW Check (BILL)	7
BILL	Mortgage Inquiry (BILL)	68
BILL	Other (BILL)	23
BILL	Payment Posted (BILL)	136
BILL	Question (BILL)	92
BILL	Reminder/Follow up (BILL)	196
BILL	Updates (BILL)	56
CANCEL	Carrier Initiated (CANCEL)	14
CANCEL	Moved (CANCEL)	22
CANCEL	Opted Not to Insure (CANCEL)	7
CANCEL	Other (CANCEL)	40
CANCEL	Other (CANCEL)	45
CANCEL	Passed Away (CANCEL)	4
CANCEL	Pricing (CANCEL)	96
CANCEL	Rewrite (CANCEL)	18
CANCEL	Sold Risk (CANCEL)	40
CL NB	Accepted (CL NB)	25
CL NB	Binder Rec'd (CL NB)	8
CL NB	Binder Request (CL NB)	16
CL NB	Carrier Follow Up (CL NB)	18
CL NB	Deliberation (CL NB)	10

Dive in….

For example – what is in our CL NB Pipeline.

There are other ways you can get this data with status and sub status, for us the one click nature of a tag is easier than updating sub status.

29	CL NB	Accepted (CL NB)	25
30	CL NB	Binder Rec'd (CL NB)	8
31	CL NB	Binder Request (CL NB)	16
32	CL NB	Carrier Follow Up (CL NB)	18
33	CL NB	Deliberation (CL NB)	10
34	CL NB	Follow Up (CL NB)	58
35	CL NB	Gathering Info (CL NB)	58
36	CL NB	Ghosted (CL NB)	17
37	CL NB	Initial Contact (CL NB)	7
38	CL NB	Links Sent (CL NB)	11
39	CL NB	Looking for Market (CL NB)	111
40	CL NB	Other (CL NB)	13
41	CL NB	Policy Rec'd (CL NB)	19
42	CL NB	Quote Presented (CL NB)	59
43	CL NB	Quote Requested (CL NB)	41
44	CL NB	Refused (CL NB)	16
45	CL NB	Rejected (CL NB)	9
46	CL NB	UW Complete (CL NB)	2
47	CL NB	Waiting on Client (CL NB)	18

I love this stuff… so just one more example …

Count of Client Name	Column I										
Row Labels	AR	AS	AW	AO	AM	JV	LG	LS	PS	SR	Grand Total
Bill	20	37	15	15	1	22	19	4	40	6	179
Grand Total	20	37	15	15	1	22	19	4	40	6	179

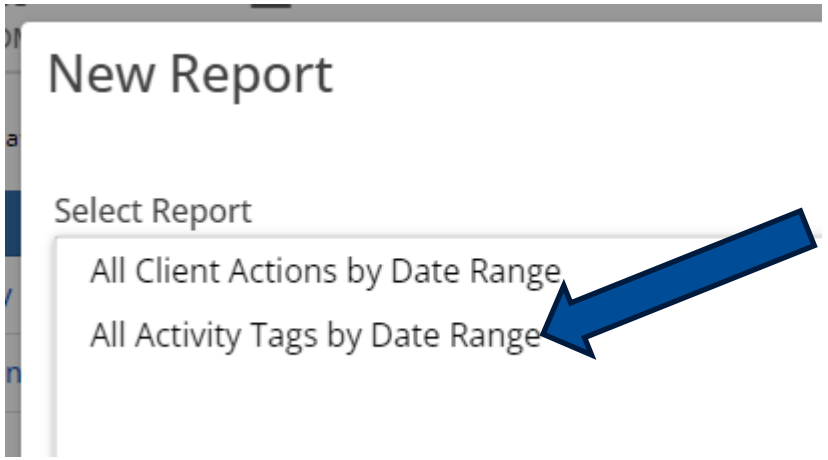
Count of Client Name	Column Labels										
Row Labels	AR	AS	AW	AO	AM	JV	LG	LS	PS	SR	Grand Total
Bill	20	37	15	15	1	22	19	4	40	6	179
Add'l Interest (END), Mortgage Inquiry (BILL), Non Prem Change, Reminder/Follow up (BILL)		1									1
Agency Bill Process			1								1
Ascend, Payment Posted (BILL)									1		1
Ascend, Reminder/Follow up (BILL)									5		5
Carrier Refund (BILL)				1	1	1					3
Carrier Refund (BILL), Other (CANCEL)		1									1
Carrier Refund (BILL), Reminder/Follow up (BILL)						1					1
Change Payment Method (BILL)			1								1
Change Payment Method (BILL), Other (BILL)		1									1
Invoicing-Agency Bill			8								8
Issue (BILL)										1	1
Mortgage Inquiry (BILL)		3	1				5				9
Mortgage Inquiry (BILL), Process Payment									1		1
Mortgage Inquiry (BILL), Question (BILL)				1							1
Mortgage Inquiry (BILL), Reminder/Follow up (BILL)		10		1					1		12
Mortgage Inquiry (BILL), Reminder/Follow up (BILL), Add'l Interest (END), Non Prem Change		1									1
Non Pay, Reminder/Follow up (BILL)	3										3
Other (BILL)						1					1
Other (BILL), Updates (BILL)									1		1
Payment Posted (BILL)	3	10	1	3		4	2		9	2	34
Payment Posted (BILL), Follow Up (QUOTE)				1							1
Payment Posted (BILL), Question (BILL)									1		1
Process Payment, Payment Posted (BILL)									5		5

Using a quick pivot table in excel, I can see who is doing what kinds of tasks.

OK you've probably seen enough we should move on!

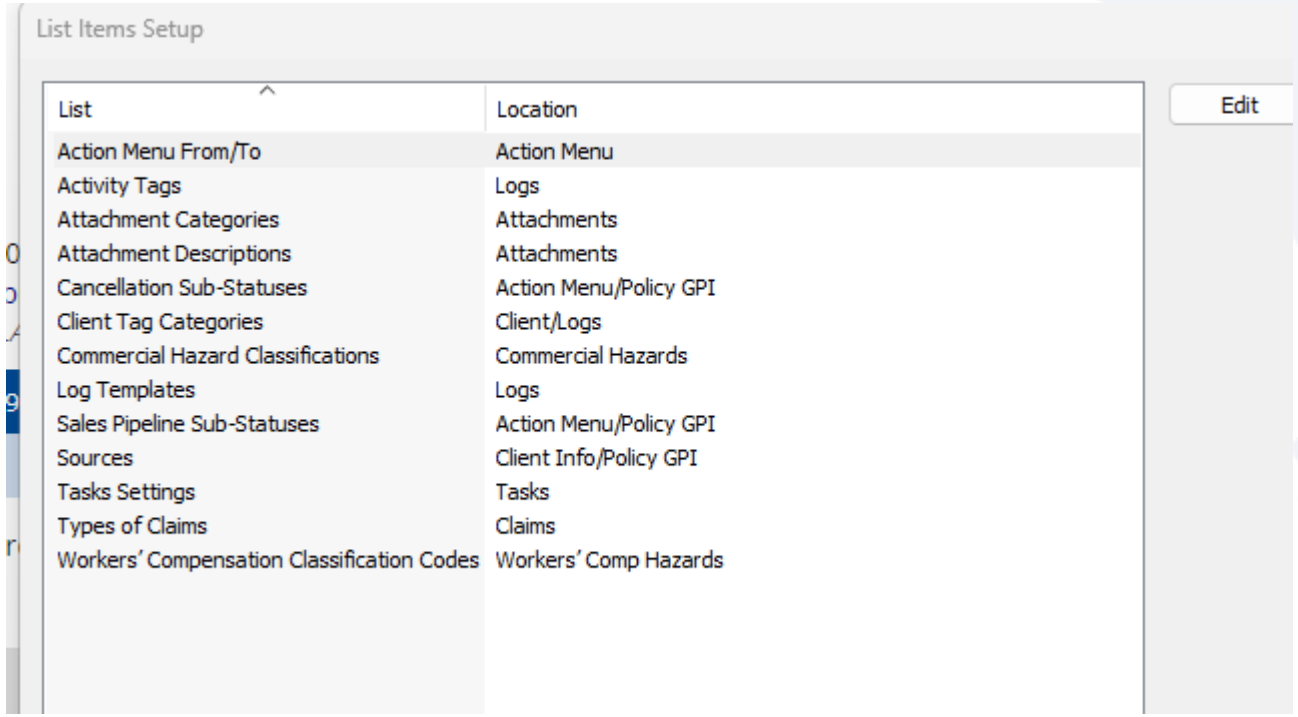
Oh Shoot! There was one more….

Really fast here….. If you choose the other option on tag reports, you'll get a nice layout like this….. It is cool too – just a couple things that I don't love so I don't use it as much but for quick view of what is going it is great!



New Business > Quote > Sent to Client (NB)	81
New Business > Refused (NB)	50
New Business > Rejected (NB)	28
New Business > UW Complete (NB)	34
Nonrenewal > Client Notified (NONR)	47
Nonrenewal > Other (NONR)	29
Nonrenewal > Received from Carrier (NONR) > Change in Risk (NONR)	3
Nonrenewal > Received from Carrier (NONR) > Maintenance (NONR)	6
Nonrenewal > Received from Carrier (NONR) > MVR - ACC - Driver (NONR)	3
Nonrenewal > Received from Carrier (NONR) > Other Carrier Reason (NONR)	10
Nonrenewal > Rescission Requested (NONR) > Rescission Approved (NONR)	4
Nonrenewal > Rescission Requested (NONR) > Rescission Rejected (NONR)	1
Policy Change > Added Coverage	5
Policy Change > Driver Added/Removed	11
Policy Change > Non Prem Change	53
Policy Change > Other	55

Setting things up – Customize Lists



My mama raised me proper – of course I'll Share…

HawkSoft User Group
EMBRACING TECHNOLOGY TOGETHER

	A	B	C	D	E	F	G
1	PL/CL/BOTH	Activity Tags-1st Level	Tags 2nd Level	Tags 3rd Level	Intended Use Notes		
2	**BOTH**	**Account Review**					
3	BOTH	Account Review	Agency Requested (AR)				
4	BOTH	Account Review	Attempted Contract (AR)				
5	BOTH	Account Review	Insured Requested (AR)				
6	BOTH	Account Review	Completed (AR)				
7	BOTH	Account Review	Declined (AR)				
8	BOTH	Account Review	Done-Cov Offered/Declined (AR)				
9	BOTH	Account Review	Done-No Coverage Changed (AR)				
10	BOTH	Account Review	Done-Coverage Added (AR)				
11	BOTH	Account Review	Other (AR)				
12	BOTH	Account Review	Scheduled (AR)				
13	**BOTH**	**Billing**					
14	BOTH	Billing	Ascend				
15	BOTH	Billing	Agency Bill Process				
16	BOTH	Billing	Change Payment Method (BILL)				
17	BOTH	Billing	Invoicing-Agency Bill				
18	BOTH	Billing	Issue (BILL)				
19	BOTH	Billing	Mailed PNW Check (BILL)				
20	BOTH	Billing	Mortgage Inquiry (BILL)				
21	BOTH	Billing	Other (BILL)				
22	BOTH	Billing	Payment Posted (BILL)				
23	BOTH	Billing	Process Payment				
24	BOTH	Billing	Question (BILL)				
25	BOTH	Billing	Reminder/Follow Up (BILL)				
26	BOTH	Billing	Updates (BILL)				
27	**BOTH**	**Cancellation**					
28	BOTH	Cancellation	Carrier Initiated (CANCEL)				
29	BOTH	Cancellation	**Insured Req**				
30	BOTH	Cancellation	Insured Req	Left Agency			

Wrapping up !

Log Notes – Document file just as they always have
Tasks – Took over where suspenses were – same thing different name
Task Categories- Feature carry over from 5 – helps with organizing work etc
Task Templates – New time saving feature to have commonly used tasks, and timelines fill in automatically
Tags – New Feature several benefits

Default Tasks was just recently rolled out so feel free to reach out to support if you want more detail on that!

Q&A

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