

Why Automate Your Agency?

Increase Agency Productivity & Efficiency

The Cost of a Paper File

- The average time to retrieve and re-file a paper document is 10 minutes. If your assistant earns \$12 per hour, retrieval and re-filing of each paper document costs approximately \$2.00.
- Retrieving and re-filing ten paper documents per day will cost over \$500 per month.
- An average of 3% of documents are lost or misfiled and have to be recovered at an alarming cost of \$120 per document.
- The average office worker makes 61 trips per week to the fax machine, copier and printer.
- If it costs \$2.00 to retrieve and re-file a paper document, what does it cost to fax, print or copy? Use the same \$2.00 per document and multiply it by the weekly average of 61. Your labor cost is \$122.00 per week or \$524.60 per month.
- It costs about \$25,000 to fill a four-drawer filing cabinet and over \$2,100 per year to maintain it.

(Source: Gartner Group, Coopers & Lybrand, Ernst & Young)

Today's Electronic File

- Put any customer file on any employee's desk instantly
 - No more "hunting" for files
 - No more putting the customer on hold to pull the file
 - Allows you to electronically store anything you would put in a paper file and more
- High-speed scanning allows for paper document storage
- Digital photos
- Email correspondence
- Company Downloads
- Information from Websites and other electronic media
- Digital recordings, ie. Voicemail messages
 - Customer information is more "portable"
- Send Letters with pre-filled information
- Create ACORD Forms faster and with fewer mistakes
- Move customer information to company websites
- Move customer information to and from rating software
- Email ACORD Forms, Letters, Change Requests, etc. without printing or faxing.

Increase Customer Satisfaction

- Answer questions faster and more accurately
 - Every customer file on every desktop
 - Complete file history easily viewable without "digging" through a paper file
 - Let the software "remember" customer information for you, including: prior insured vehicles, drivers, customer birthdays, and billing info
- Cross Sell needed products

Proven Insurance
Agency Management
Solutions

Decrease E&O Exposure

Document, Document, Document

Quickly Document All Conversations

- Staff is more likely to document if they can quickly retrieve the customer file versus pulling the customer file to write a note.
- Self-Documentation
 - As transactions are created, CMS automatically creates transaction history.
- Create Follow-ups.
 - No more lost post-it notes
 - Automatic Reminders
 - Find and correct problems BEFORE the insured calls.
- Record and Track Customer Payments
 - Date/Time stamp
 - E&O carriers recommend offsite copies of documentation.
 - Not possible with paper files - Catastrophic loss, ie. Fire, means complete loss of customer documentation
 - Electronic files can be backed-up and stored anywhere and have an unlimited number of copies.
 - More timely and accurate information
 - Out of order papers in the paper file causes incorrect information to be given out.
 - Downloaded information means you have updated information before the customer
 - Develop and Monitor Agency Procedures

Increase Sales Opportunities

- Marketing reports on the customers that already know and value you.
 - Cross Sell
 - Referral Requests
- Mass Mailing Form Letters
- Re-quote prospects
- Regular Customer contact
 - Birthday mailings
 - Holiday mailings
 - Policy Review at Renewal

More Effective Management of Agency

- Track Company Commissions
- Better Trust Account management
- Track New Business production
 - by producer
 - by company
 - Identify changes in your market faster
- Track customer contact
 - Activity Reports
 - Monitor adherence to agency procedures

More Opportunity for Profitability

- On average, agencies that use automation have 1.4 fewer employees per 1000 customers.
- Electronic files are more efficient than paper files
 - Increased efficiency means increased profitability
- Agencies that use automation have higher values at time of sale.
- Faster and more accurate customer service increases policy retention



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