

Customer Spotlight

Converting to new software doesn't have to be painful!

This customer spotlight is based on an interview with **Michael Hagan**, Principal at Beacon Benefits, Inc.



Reliable, efficient tools at a reasonable price

Michael Hagan was previously using a different software vendor until he learned their subscription costs would be increasing drastically come their renewal period. So, he and his team began researching new options and as they spoke to current ftwilliam.com users and heard their positive recommendations, they decided to learn more. As a Principal of Beacon Benefits, Inc., and responsible for a large number of plans himself, Michael needed software that could provide both him and the company with reliable, efficient tools at a reasonable price,

and one that didn't require a steep learning curve or complicated conversion process.

"Everybody we spoke to spoke very highly of ftwilliam.com, so when we reached out and were shown all of the demos and the pricing difference, it was a no-brainer for us. ftwilliam.com's products are exactly what we need."

No steep learning curve or complicated conversion process

Michael and his team transitioned in 2014 to ftwilliam.com's Documents, 5500, and Compliance software modules. Even with a large number of plans to convert, they found the process to be painless, stating, "it's very easy and intuitive to use the software, so we've been very happy with that transition."

When asked what he liked most about ftwilliam.com's software, Michael mentioned the simplicity, ease of use, and the intuitive nature of the software. *"The Compliance software itself actually has you flow nice and easy through its step-by-step process and tasks," versus having to go to multiple places to complete one item. And if you do accidentally enter incorrect information it doesn't take a herculean effort to correct it. "With ftwilliam.com, if we accidentally put in the wrong information, we can just quickly delete the year, create a new year, and start over from scratch and not have that lingering issue where we have to manually go in and fix things one-by-one."*

Switching to ftwilliam.com is a "no-brainer"

We asked Michael what he would say to someone who was considering switching to ftwilliam.com to which he enthusiastically replied, "I would say, 'Absolutely.' It would be a no-brainer for me." In fact, Michael recently recommended it to one of the outside actuaries he works with on their pension plans. *"We were explaining to her how much of an easy transition it was, and now she's looking at it. There was never a hesitation in my mind for recommending it."* At conferences when approached about which software we use, "we are always saying how great [ftwilliam.com], how easy it is, and how all the different platforms -- the Documents, the 5500, and the Compliance software -- are just so seamlessly integrated with each other."

Continuous improvements

ftwilliam.com provides support throughout the entire conversion process, and the ftwilliam.com team is fully committed to continually improving the software. As Michael noted, *"we are frequently getting stuff from ftwilliam talking about how they are improving the software and adding these different features that I think were hundreds of years away in [our former platform], so now that we're spoiled with this information it can't come soon enough."*

So, the moral of the story is that converting to new software, specifically ftwilliam.com's software, doesn't have to be painful. In fact, you could end up feeling "spoiled!"