



HAWKSOFT[®]

Empowering Agents

Journey to HawkSoft

One Agency's Success Story

“I loved my legacy system (FSC Manager) because they listened to our requests and offered great support. We decided to move to a system developed by a large, multi-billion-dollar company. We thought the transition would be easy. Boy, was I wrong! The experience was a nightmare. I squandered more than \$7000. Finally, I switched to HawkSoft. It was like a breath of fresh air!”

– Jay Arneson

The Problem

After spending over \$7000 on training and setup for their move from their legacy system (FSC Manager) to another system by a multi-billion-dollar insurance technology company, Jay Arneson's agency wasn't happy. Buyer's remorse set in after realizing they were sold a system that didn't live up to promises. The conversion didn't move key policyholder data. Commercial and personal lines workflows were complicated and required too many steps. Farm workflows were inefficient. One-on-one support, Jay learned, really meant email support with a turnaround time of 3-5 days.

“It took way too many clicks to do anything,” said Jay Arneson. “We sure didn't get what we thought we were getting. And we were training with the system for 6 months before going live, so training wasn't the issue.”

Key Business Decision

Should Jay keep spending money for a system that's not working but backed by one of the biggest vendors in the marketplace? Or, should he cut his losses and invest in a vendor focused on delivering the best customer experience and a system that can carry his agency forward in the years ahead?

For three generations starting with Jay's grandfather, their agency's bedrock is investing in long-term relationships. With a 93% policy retention rate, both Jay and his clients value stability. Borrowing from this founding philosophy, Jay decided to switch to HawkSoft's management system. HawkSoft is proud to have a 97% recommendation rate by agencies that use their system.

The Results

“Other agencies that I know had decided to move to HawkSoft,” says Jay. “My colleagues spoke very highly of the system, so I gave it a try.”

Jay says his agency feels at home with HawkSoft. The transfer of data from the old system was smooth. HawkSoft supports farm, commercial, and personal workflows—all key to Jay's business. His accountant is thrilled that the insurance accounting in HawkSoft integrates with QuickBooks, the #1 accounting system for insurance agencies. HawkSoft's carrier downloads for personal and commercial lines are saving Jay's agency a lot of time.

“HawkSoft is a very intuitive system,” says Jay. “From day one, it was clear to me that I was speaking with genuine people who value long-term relationships as much as I do. I'm treated like family every time I talk to someone at HawkSoft.”

Agency Facts

Established: 1899

Lines: 60% Personal, 35% Commercial, 5% Life/Health

Employees: 3 Full-time

Offices: 1 office, 1750 sqft

Annual Premium: \$3,100,000

Agency's Strengths: Team works great together and is loyal to each other

Agency's Opportunities: Improve agency efficiency; shorten response times to clients

Keys to Success: Know your management system. Take full advantage of it. It saves a lot of money and makes the work of running an agency more pleasurable.

First-call resolution when
your agency needs help

93%

Agencies using HawkSoft
that recommend it to others

97%

Average time agencies
stay with HawkSoft

18 Years



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