

Why Large Enterprise Agency Management Systems Don't Work for Most Agencies

“ I consider the decision to go with [redacted name] to be in the top 10 mistakes I've made in my insurance career. That's 30 years. ”

- *Bob Bethel*

All companies love to hear positive feedback from their customers, especially unsolicited. When Bob Bethel sent us a note about how happy his agency was with HawkSoft powering the workflows of their insurance agency after nearly four frustrating years with another well-known management system vendor, our ears perked and we wanted to learn more.

Bob is a candid person. Sometimes, candid is exactly what others need to hear. We left much of this interview unfiltered to share Bob's raw emotions.

It's real, raw, and refreshing.

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A Candid Interview with Independent Agent, Bob Bethel.



Leaving an enterprise management system vendor

HS : Bob, this is really just an open discussion. We want to learn from your experience so other agencies can benefit from the insight. How long were you with your prior management system?

Bob : Too long. 3 1/2 years.

HS : Can you tell us how you started with them and what brought you to HawkSoft?

Bob : Someone showed me a demo of [redacted name]. It got high praises from some people, but I probably didn't do my diligence when I bought into that crap. I paid them close to \$10,000 to install and transfer data. After training ended, I learned their system is strictly for massive agencies. If any average-sized agency is using that system, they don't know what they're doing. Or, the agency owner isn't pissed off enough to get out of their contract.

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I wasted \$10,000 on a system meant for massive agencies.

HS : What do you mean by “massive agencies”? What types of agencies do you feel their system is designed for?

Bob : The large enterprise systems may work for agencies with 100s of employees. Any agency with 1-100 users would be foolish not to go with HawkSoft.

HS : Do you feel this way because of the features or price? Or, is it something else like the customer service? Why do you feel large enterprise systems do not work for average-sized agencies?

Bob : Customer service is horrible. To be honest, it was okay at first. Then, a billion-dollar investment group bought it and the service just went to hell. That, along with price, were my biggest frustrations with [redacted name]. Then, I decided to do a demo with HawkSoft. It was impressive and idiot-proof. I liked the nifty features like drag-and-drop and menus that explain exactly what you’re doing. If I was to design my own management system, it would be very similar to HawkSoft.

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Comparing vendors

HS : With [redacted name], did you feel it was difficult to figure out how to engage workflows and navigate their system?

Bob : I consider the decision to go with [redacted name] to be among the top 10 mistakes I've made in my insurance career. And that's a long 30 years I'm talking about. [redacted name] was completely cumbersome. It was ridiculous. HawkSoft prefills so much more data in ACORD Forms than they do. Their system is so difficult to learn that training new staff isn't worth the effort. It took so much time. You get overwhelmed.

I am left with raw resentment and forever hoping that nobody buys their system again. HawkSoft, on the other hand, is very intuitive and designed with the insurance agent's thought process in mind.

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[Redacted name] has cumbersome workflows and the system is difficult to learn.

Comparing data conversions

HS : Let's dive deeper into the data conversion process. How did the move from their system to HawkSoft go?

Bob : Let's start on a good note. When we moved to HawkSoft, you had my data for a half day, and I was up and running. [Redacted name] wanted \$3,000 for my data just to leave their system. I found it insulting that they wanted three grand after I paid them for the installation and the monthly fees. I asked them, "What if I don't give you the three grand for my data, when can I have my data?" They said I could get my data three days later. Three days turned into 20 days with countless stressful phone calls. They didn't send my data when they agreed, they sent it three weeks later, and the data was locked. During this delay, I had to run my agency off of a printout! I'm serious.

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My data was held
hostage for \$3,000.

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Comparing training

HS : How does their training compare with HawkSoft's training? Do you feel your staff was better trained with HawkSoft?

Bob : Yes. Their training isn't as comprehensive because that system is so cumbersome. Their workflows really slow down production. It requires the employee to have too much knowledge to run an insurance agency management system.

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HawkSoft's support is a thousand times faster to resolve issues.

Comparing customer service

HS : How were you treated when you called customer service? Were problems easily resolved?

Bob : With HawkSoft, not only did we eliminate the number of instances where we needed support or additional training, but you guys are a thousand times faster to resolve issues. With HawkSoft, I can't tell you how many times I said, "Hey, you want to take a look at this with me?" and I got a support session number going in the first 10 seconds of the phone call. We're getting fixed in two minutes rather than waiting for five minutes on hold.

Comparing reporting capabilities and documentation

HS : How do you compare the reporting suite between the vendors?

Bob : Simple: their system sucks so bad I didn't even bother with reports. I just relied on my own Excel spreadsheets.

HS : Did all of your staff feel the same way?

Bob : [laughs] If looks could kill, Scott would have probably killed me a hundred times over by now. He's probably the best auto agent in the county, if not all of Southern California. He's an extremely bright fella and he hated their system and reports. He's thanked me at least 50 times for switching to HawkSoft.

HS : How do your employees feel about spending the majority of their working day using HawkSoft's system?

Bob : When it comes to annotating files and making log entries, the suspense (tasks) system, and calendar, HawkSoft is night and day ahead of every other system I've used. As I've said before, it would be ridiculous for agencies with less than 100 employees to not use your system if efficiency and intuitive workflows are big concerns.

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Annotating, log entries
and documentation in
HawkSoft is way ahead
of the competition.”

HS : Is there anything else you'd like to share with us?

Bob : Look, I didn't have to take your call. I've got plenty of work to do. But, you are talking to a big fan who really wants to share his experience. I still don't know the whole HawkSoft system, but I know it well enough to do what I've got to do. Your system does it well. If you ever tell anybody to call me for my comparison of HawkSoft and [redacted name], I'll be very honest and candid with them.

My agency really appreciates your efforts and work. Keep making HawkSoft better.

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Bethel Insurance Services

Established: 1988

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