

Customer Spotlight

Make the switch to ftwilliam.com – “I wish I had done it sooner!”

This customer spotlight is based on an interview with **Beverly Hudson**, Vice President of David G. Leonard and Associates, Inc.



Beverly Hudson has over 35 years of experience in the pension industry with a concentrated focus on third party administration services for defined contribution plans. As Vice President and co-owner of David G Leonard & Associates, Inc., she manages operations, installation, and implementation services while assisting with strategic plan design to acquire new business.

Beverly had been loyally using her previous software vendor for 25 years and was used to its logic. She first heard about ftwilliam.com’s software during an industry conference, but was nervous about trying something new because, “What if?”. However, after speaking with her ftwilliam.com Sales Representative, she decided to test ftwilliam.com out by starting with the 5500 forms software.

“I tried out the 5500 software and I thought ‘Oh my god. This is wow!’. Even Dave said, ‘Thank you for switching us over. This is really nice.’ Honestly, I just wish I had done it sooner.”

Why the “wow”?

Beverly was impressed with the ability to make adjustments within the documents themselves once loaded, the seamless integration between the ftwilliam.com modules, and the amazing service she got from customer support. All combined it made a compelling reason to start converting to more of ftwilliam.com’s software modules.

So, finding the transition to be seamless and ftwilliam.com’s software easy to use and intuitive, Beverly added on the 1099, Compliance, and Portal modules. She saw first-hand how the integration between the modules was “powerful”. When she switched over her legal documents, “everything integrated immediately with all the forms.” And “I have an audited plan that I did on ftwilliam.com which ran really smooth. Gives me all the reports I need and everything the auditor requests. I love the integration of all of the products.”

A natural way to transition

Given how smoothly the modules work together and the excellent customer support, Beverly decided it was time to try a new Compliance software. She recommends starting with 5500 and/or Documents to get a feel for the ftwilliam.com software before converting to Compliance. By using this approach, there was still work in transitioning over to Compliance, but it was the most natural way of doing it. She ultimately found the ftwilliam.com Compliance Module to be “easy to use, logical, and more flexible” than her previous software.

“I just wish I had done it sooner once I realized that I didn’t need the security blanket [of my previous software], which turned out not to be a security blanket after all.”

ftwilliam.com software provides greater flexibility

In fact, *“within the ftwilliam.com Compliance system there are so many more things you can do easier than you can in other [competitive] software.”* With her previous software, *“when you uploaded something, it was just there. But with the ftwilliam.com software, after you upload something you can actually make adjustments [individually or by batch]. Once I figured that out I said, ‘I cannot believe I didn’t make this transition years earlier!’ I tell other TPAs that they really need to look at ftwilliam.com.”*

The recent enhancements to ftwilliam.com’s Compliance Module have further streamlined Beverly’s processes, giving her more time to dedicate to providing her clients with the best service. The Payroll Data Accumulator is *“very intuitive and allows me to update pooled accounts quarterly with ease.”* She also loves the Distribution Processing Feature, and adds *“– but the forfeiture feature is sweet!”*

Top notch customer support and all the attention of a small company

In addition to the excellent customer support provided to allow for seamless conversion, the ftwilliam.com product and customer support staff genuinely make the effort to listen to the needs of their customers, and follow through with their promises in a timely fashion. *“With ftwilliam, I feel all of that [small company] energy and enthusiasm, and they really listen to you. Obviously, you can’t fix or change things overnight, but you know ftwilliam.com makes a list of priorities, and what needs to be updated or tweaked. You feel like you are being heard and it’s all for the administrators.”*

So, is switching extremely painful?

“It can be painful changing software because you have a whole new learning curve, and some of us get to the point where we are like, ‘I don’t want to learn anything else.’ But I found that you didn’t have to know the meat and potatoes of it.” ftwilliam.com will be there every step of the way during your transition to make it as seamless as possible, and ultimately, you end up with software that improves your daily workflow and wonder why you didn’t make the transition earlier.

“I am loving it. You guys need to switch over to ftwilliam.com because it’s all there.”

To learn more, please visit ftwilliam.com or call **1-800-596-0714** to schedule a demo.