Customer Spotlight

Converting to the Compliance Software – "ftwilliam.com just flows better!"

This customer spotlight is based on an interview with **Peggy Roisch**, Director of Retirement Operations at Marsh & McLennan Agency LLC

Peggy Roisch, Director of Retirement Operations, and her team at Marsh & McLennan Agency LLC, a world class provider of value-driven employee benefit solutions, has been an ftwilliam.com customer for several years now. Prior to converting to ftwilliam.com, Peggy and her team had been using the same employee benefits software vendor for more than a decade. However, as the cost continued to rise each year Peggy started researching what other options were available and zeroed in on ftwilliam.com. They started with the ftwilliam.com 5500 software and quickly fell in love with the software after an easy conversion. Next, they converted over to the ftwilliam.com Documents Software with PPA restatements.

Converting to the Compliance software

Since the ftwilliam.com modules are fully integrated and follow the same intuitive design it was an easy learning curve for Peggy and her team so the following year, they made the decision to tackle the big one – Compliance. To their surprise, even with hundreds of plans, they found the conversion to be "very easy."

"Obviously there's some work involved, but once we got the process down, and with the great support from ftwilliam.com, I can't say that we had any issues with the conversion. We just love the Compliance software."

Useful Compliance features and functionalities

When asked what features and functionalities were most useful during that first season, Peggy replied, *"we really like the Compliance testing features, reports, and overall package that we could generate so easily at the end of the season." After successfully completing their first season utilizing the ftwilliam.com Compliance software, they were excited to dive further into the software and take advantage of the customization and automation features available the following year. "The first year you are just trying to learn the software and ensure everything flows through smoothly. Now we are becoming more automated and leveraging all the great features within the software. This year we've used the batching, online questionnaire, and the batching feature to send out all of our census worksheets which is a big time saver."*

But what about training?

Everyone dreads training on a new system, but the training and support from Jane Nickalls and Janice Herrin, the ftwilliam.com Compliance go-to duo, provided Peggy and her entire team with direct support throughout the entire process making the first season less overwhelming. *"The upfront training was helpful, but until you get into the software and start doing an actual valuation, that's when all of the questions would come up. We would arrange a call with Jane or*

Janice and they would answer all of our questions and walk us through it. I can't say enough about these two women and their support."

"The dedicated and hands on customer support was a huge part of our decision to switch to ftwilliam.com from our previous vendor. We could call ftwilliam.com and get a person."

Module by module

"We recently onboarded the Proposal software and PensionPro. The fact that you guys have partnered with them and the two softwares can talk to each other has been helpful in further streamlining our process."

We are also *"very happy with the secure ftwilliam.com portal, and we are trying to get all of our clients trained to deliver everything through the portal so that's working very well."*

If the TPA firm has the time, starting with one module and adding on as you go, or as new modules and enhancements become available, is one method of converting from one software to another. *"Plus, it's not so overwhelming to your staff. We didn't exactly plan it out that way because we originally thought let's just do the 5500s because they were so reasonably priced, but then we just loved it and worked into the other modules as we learned what else was available. That plan really worked for us."*

"ftwilliam.com just flows better"

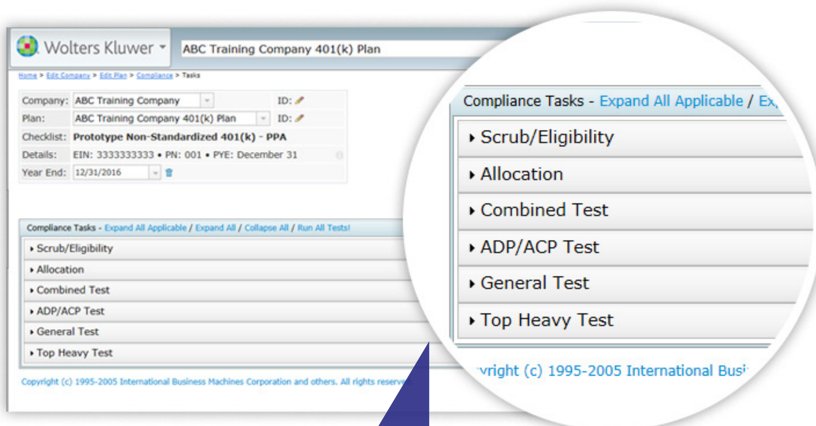
Overall, ftwilliam.com compared to the competition "just flows better." *"It's intuitive the way you all have structured the whole Compliance module. And you carry that through all of your modules. So, having already been on 5500 and Documents we had a basic understanding of how you navigate around the Compliance module."*

The ftwilliam.com software solutions are also fully integrated with each other, so users who have to know how to do everything from 5500 to Compliance to plan documents, ultimately benefit from the integration between modules.

Considering moving to ftwilliam.com?

"Do it! The sooner the better!"

"I've been a referral for a few TPA firms and I told them, do it. They were worried about the conversion and I said, 'It's not bad, it's a little bit of work, but we had no issues.'"



Sample Plan within ftwilliam.com's Compliance Testing and Reporting Module