



All Data Conversions Are Not Created Equal

Your biggest assets are your book of business and the rich client relationships and notes that you have accumulated over the years. Losing this information and facing down-time are the biggest risks that agents face when converting to a new system.

When agencies part ways with their legacy insurance management system, our team helps migrate **more data** than any other vendor. We also have the **fastest go-live** timeline in the industry.

“

The thought of changing systems was overwhelming. We braced ourselves for days, if not weeks, of down time. I couldn't have imagined a better transition! The system works - no errors, no glitches, no excuses!

Kasey Childs
Dan King Agency, Wisconsin

The HawkSoft Conversion Difference

Our industry leading conversion process gives you two distinct advantages:

More Data. We convert more of your legacy data than any other vendor.

Go-live in 24 hours. After a short implementation, your final data is uploaded overnight so you can hit the ground running the next day (excludes weekends).

Consultative Approach. Dedicated Conversion Specialists.



Open communication

We set realistic expectations, giving you a clear picture of which data can and cannot be converted. If a conversion doesn't make sense, we will tell you.



In-house specialists

With 25 years of combined expertise, our in-house specialists are pros with data implementation. Other vendors often outsource and lose control of custom programming.



Fast and accurate implementation

We listen to your concerns and customize the data conversion to your needs. The average implementation time from start to finish is 4-6 weeks. The average go-live time after you approve the final data upload is 24 hours.



Superior data validation

We deploy two complete data imports. The Initial Conversion gives you time to review your converted data and work with our specialists to request changes. The Final Go-Live Conversion imports a final copy of your most current data. We execute this overnight so there is virtually zero data discrepancy between your legacy system and HawkSoft.



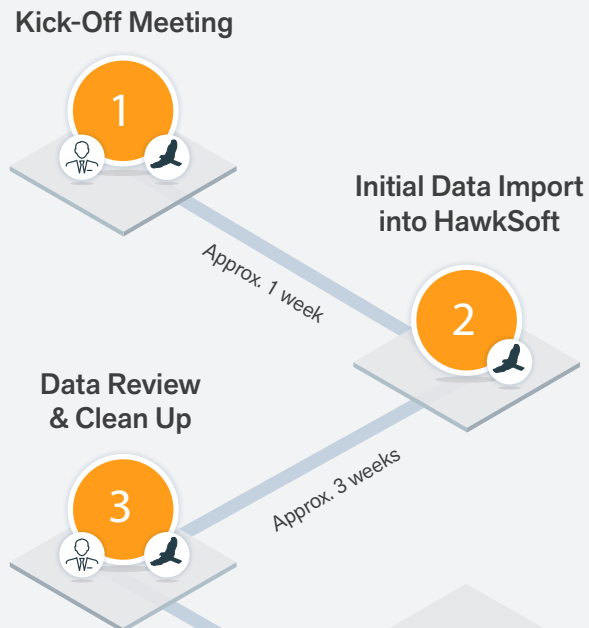
Convert financial data (Optional Service)

We offer optional Managed Accounting Services to convert accounting data to HawkSoft's accounting platform — QuickBooks®.

Successful 2-Stage Conversion, Every Time

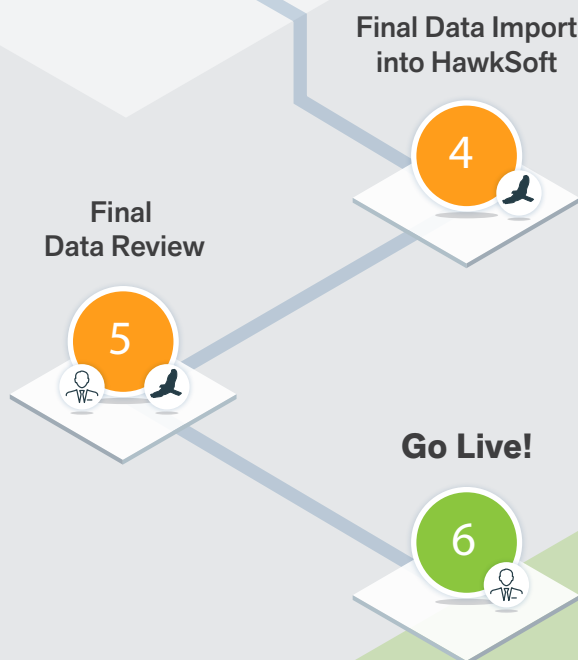
Onboarding with HawkSoft begins with a successful 2-stage conversion.
The average implementation process takes 4-6 weeks (or less).

STAGE 1 Initial Conversion



Professional
training for
staff

STAGE 2 Final Conversion



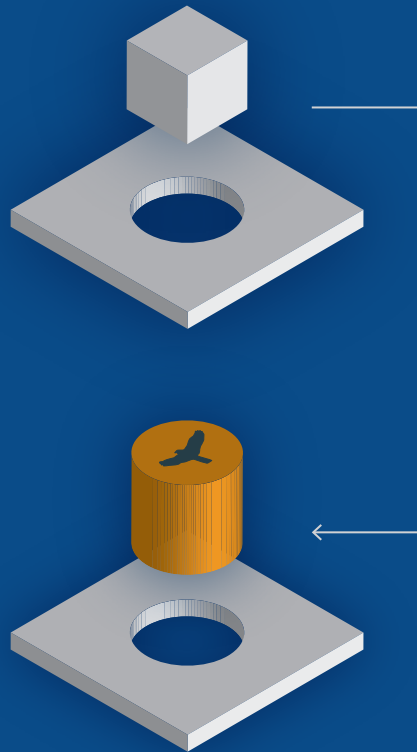
**Within
24 Hours**

Excluding
weekends

Converting Data Doesn't Have To Be Painful

Many fear converting data to a new system because it's like trying to put a square peg in a round hole.

Despite this real challenge, HawkSoft has engineered ways to make the corners fit. We know how other systems' data is formatted and which HawkSoft fields to map to. We've spent years refining this process and documenting workflows.



HawkSoft
has engineered
ways to convert
more data



Did you know HawkSoft is the only system that offers a local server deployment option?

[Learn more](#) about the right deployment option for your agency.

Conversion Data Rubric

This rubric helps you compare HawkSoft's data conversions with other vendors. Have them fill in the blanks so you can quantifiably compare conversion services.

		HawkSoft	What can other vendors do?
	PLATINUM <ul style="list-style-type: none"> Custom Requests 	Data included at no extra cost except Platinum	Fill in the blank
	GOLD <ul style="list-style-type: none"> ACORD Forms (varies by system) Certificates of Insurance 	May cost extra depending on request	Is it offered?
	SILVER <p>Policy details with company downloads:</p> <ul style="list-style-type: none"> Vehicle coverages, underwriting, drivers Home coverages, underwriting, mortgagees Other policy coverages, locations, buildings 	✓	Does it cost extra?
	BRONZE <div> <div>Basic client information</div> <ul style="list-style-type: none"> Name, address, contact info Log notes Attachments </div> <div> <div>Basic policy information</div> <ul style="list-style-type: none"> Effective date Expiration date Current premium </div>	✓	Does it cost extra?

Data elements from the base level, Bronze, are included in every tier.

Like every agency, every conversion is unique. A HawkSoft conversion specialist will prepare a Conversion Worksheet to identify any limitations to what we can convert with your data.

Number of years of historical data that can be converted: **Unlimited!**



“

We fell in love with HawkSoft. The Monday morning we came to work after the data conversion, my entire agency was working in HawkSoft without any training. It's that intuitive! HawkSoft updates their software so many times, and they never charge us for it. You'd be a fool not to take this system.

Geri Custer

Geri Custer Insurance Protection Team, AZ

Setup JumpStart™

\$500 value included at no cost for a limited time.

HawkSoft has developed a unique process to collect your Policy Company Setup information. This saves you 8 - 12 hours of manual entry time. Default policy titles, LOBs, coverages, carriers, and more can be quickly mapped, and imported into HawkSoft all at once.*

This \$500 onboarding service is included at no charge for a limited time. Here's a [sample](#) of the data that may be included with Setup JumpStart.

*Data mapping varies based on the legacy system you are converting from. Client validation of data is still required.



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