# **Quick Switch Kit**

The ideal software to help independent insurance agencies track data and hit sales goals



North American Software Associates, Inc.

# We'll help you recommit to a software solution

The sinking feeling of being committed to a software product that isn't serving you well is one of the worst that a business owner can experience.

On the one hand, switching to better software will force your company to endure costly downtime, and the new product is sure to come with a bothersome learning curve for you and your team.

On the other hand, continuing to work on a suboptimal platform will tie your business down, and suppress it from scaling as quickly as it could. And as you grow, it will only become *more* difficult and costly to make the switch you need.

Whether your current insurance software is primitive, dysfunctional, or prohibitively expensive, every week you go without switching is further doubling down on a platform that's holding you back. So putting off making a switch is only hampering your agency's success.

The best time to choose better and more cost-effective software was the moment you went digital. **The second-best time is right now**.



#### **Table of Contents**

Phase One: Deciding to Switch 1	
Phase Two: Determining if NASA is Right for You	
Phase Three: Steps to Switch	
Phase Four: Making the Most of Customer Success	

# > Phase One Deciding to Switch

1

#### The Switch Sensor, and how it works

Each of the struggles below is worth one point. When you've read through all of them and assessed which struggles you're experiencing, add up all your points and take a look at the corresponding number on the Switch Sensor.

#### Accessing client information feels difficult

One of the biggest reasons people switch to a new insurance software provider is because they want to increase efficiency.

If your team is consistently struggling to find policy numbers or other data quickly, it's not only stalling productivity, but it's decreasing your response time to your valued clients. In this day and age, they don't expect to need to wait very long.

#### The cost of your software is a burden

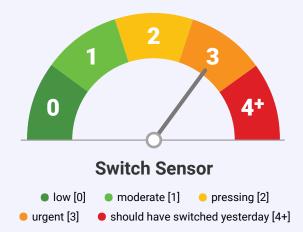
When software provides the kind of value you were promised upfront, you don't actually think about its cost very often at all.

So if you're keenly aware of the monthly spend associated with your insurance software, and if the invoice feels painful to pay, it's because you know it's not providing value for your company.

#### You're frustrated with your provider's customer service

As a business owner, few things are worse than being unable to get the answers you need, when you need them. It's a helpless feeling that nobody deserves to experience.

If you feel unsatisfied with the quality of service you're getting from your provider – or worse, struggle to even get a hold of them at all – they're holding you back from being the best you can be.



#### Your platform limits which insurance carriers you can partner with

Every carrier you work with is an additional tool in your toolbelt, so having a potentially useful new resource barred from your platform can be frustrating.

Quality insurance software comes with an extensive array of carrier partners, and a motivation to add new carriers on your behalf. Anything less will handcuff you as you work to scale.

#### You're falling short of upselling and cross-selling goals

Upselling and cross-selling are two of the simplest ways to increase your revenue. If you're not accessing those revenue streams, your company isn't living up to its full potential.

Great insurance agency software inherently facilitates upselling and cross-selling by allowing you to keep detailed records of each policy (and the policyholder). The takeaway here is that if you're missing out on that revenue, it's probably your software's fault, not yours.

# Ready to check the Switch Sensor? Scroll up and see where your needle lands!

**Note:** If you don't have *any* software in place and have not yet computerized your records, consider that an automatic four points on the Switch Sensor. Your competition has a major edge on you, but you can get ahead of them with NASA's Eclipse Insurance Agency Management System!

> Phase Two Determining if NASA is Right for You NASA's premier product, the Eclipse Insurance Agency Management System, is a powerful and user-friendly software program that's enticed independent insurance agencies from all over the country to bite the bullet and finally make the switch they need.

Here are a few of the most attractive benefits of working with Eclipse.

### Eclipse simplifies your sales process

We have over 400 insurance carrier download partners, and we're adding more every month. If you work with any carriers who are not currently on the platform, they'll be able to onboard quickly and efficiently thanks to our systemized process.

We also work with 14 comparative rating integration partners, making it easier than ever for your agents to compare and contrast different policies and give your customers exactly what they're looking for.

### Eclipse is the most user-friendly platform you can get

While we at NASA work diligently to train your staff on Eclipse before you officially make the switch, most agents find our platform so straightforward that they could probably figure it out on their own. The design cues swiftly lead your agents to the most efficient use of the software.

This ease of use allows agents to work more efficiently than ever by empowering them to find policy information in record time. That increases your overall response time to customers, boosting productivity and customer satisfaction alike.

We have over 400 insurance carrier download partners, and we're adding more every month.

#### Eclipse comes at a surprisingly affordable cost

Many new Eclipse customers have enjoyed savings of several hundred dollars per month, which effectively means that their switch paid for itself within their first year.

The system follows a per user pricing model, so you'll be in full control of whether those costs go up or down at any given time. You'll also be able to forecast how your costs will change as you scale.

### NASA offers the personal touch of a small business

As a locally-owned and community-focused company, we pride ourselves on developing personal relationships with our clients. Our level of effort and attention to detail during your switch will make you feel like our top priority — because you are.

The best part of all this is that we provide the same products and services as a large tech company. So you'll get all the tools you need, without having to sit through insufferable automated messages whenever you try to contact support.

#### We minimize downtime during your switch

Downtime is one of the most painful parts of switching to a better insurance software, and we understand the impact that downtime can have on both your bottom line and your customer success.

But because so many small businesses have transitioned to Eclipse over the past few years, we've gotten the switch process down to a science. Our team's experience means less downtime for your company as you onboard to a better software solution.







#### We provide cloud security solutions

Our cloud security offering helps you eliminate the upfront costs associated with on-prem security, and allows for elasticity within your business model.

Your data will be protected by an encrypted connection, ultramodern antivirus software, and strong firewalls, and we automatically create backups for you on a frequent basis.

#### NASA's ratings are through the roof

The best way to determine whether you can trust a software provider is by looking at their reviews. NASA customers have collectively left 25 reviews on our site, with an average rating of 4.9 stars. Check out what Brad Frideres had to say.

"Eclipse has everything needed, and some extra benefits as well. At this point, we use Eclipse for everything."

- Brad Frideres, Central States Agency





# > Phase Three Steps to Switch

If you pushed the needle on the Switch Sensor past yellow territory, and if you've decided that the Eclipse Insurance Agency Management System is right for you, congrats! You're ready to make a switch. And the sooner you initiate the transition, the better off your company will be.

While the idea of change can be nerve-racking, the change itself is smooth and painless. It happens in five simple steps.

### Meet with your Eclipse software trainer

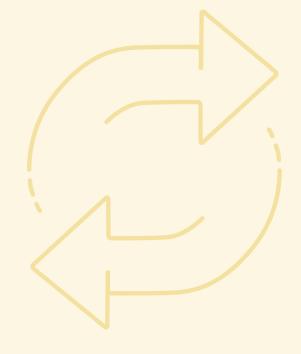
Once we take care of some simple paperwork, we'll assign you a main trainer to act as your all-purpose guide throughout the switch process, and a co-trainer to assist them. They'll introduce themselves to you, and review the training schedule.

# 2 Install your software

After we connect you with your software package, you'll be able to install it quickly and easily. If you're doing a data conversion, we'll work with you to help you bring your client data from your previous software package. Then your team can review the data, and make any adjustments necessary.

## Prepare for launch

Before you go live, your trainer will coordinate a series of web training sessions with you and your agents to get them familiar with Eclipse. They'll also set an official "go live" date, at which point you'll cut ties with your old system and start doing live data conversion into your new one.





### Integrate with your carrier partners

When you're live, we'll request initial downloads from your carrier partners to synchronize policy details and get the system's information up to date.

#### Lean on our customer success department

Our stellar service and attention to detail doesn't end when you're set up on our platform. We'll follow up with you soon after launch to make sure things are running smoothly. If you ever need assistance, you'll have no trouble getting a hold of us.

Notably, the **entire switch process** takes fewer than 90 days from the time you put the switch in motion, to the time you're live and enjoying all the benefits of the Eclipse system.

> Phase Four Making the Most of Customer Success First off, when you make it to this point, we'll make sure to give you a warm welcome into the NASA family! The stress of the switch will melt into sweet relief, and the only thing left to do will be to enjoy your shiny new platform (and the impact it makes on your bottom line).

Still, there are a few things you'll want to know in order to make your experience with NASA (and Eclipse) as stellar as it can possibly be.

### Tip #1: Your trainer will stick with you past your launch date

By the time you've fully transitioned over to the Eclipse platform, you'll have developed a close-knit personal relationship with your assigned trainer. Thankfully, you won't have to wave goodbye to them after they've helped you launch.

We understand the value of the relationships our clients build with their trainers, and although you and your team will be well-equipped to go it alone after you go live, you'll likely still have questions (and hit snags) in the ensuing weeks. Your trainer will stick with you during that time, and schedule any follow-up training sessions you need in order to work successfully on Eclipse.

### Tip #2: Use our support session feature

Even as you become fully comfortable working with Eclipse, you encounter roadblocks, or wonder whether there are more efficient ways to accomplish certain tasks. Our tight-knit, dedicated support staff are always available to hold your hand, and help you get the most out of our software.

#### Tip #3: Submit a support request

If you have a minor question that's not urgent, you can always head to <u>nasasoft.com/support</u>, scroll down to the bottom of the page, and fill out a support request.

Our online form allows you to input your agency name and a method of contact, and enter a brief description of the issue. You can even attach a screenshot! Accepting that you need to make a switch can be a tough pill to swallow. But actually *making* that change is both exciting and empowering.

If you're a growing business, it will never be easier to switch than it is today. <u>Contact NASA now</u>, and start your 90-day countdown to a better operation.



