



A Smooth Transition from QuickBooks to NetSuite That Led to a 150% Increase in ROI



An Independent
Agency's Journey to
Enhanced Efficiency
and Accuracy

www.fbspl.com

Client Overview

01. Innovating Insurance

Our client, an independent insurance agency, simplifies insurance with a transparent, customer-first approach. They offer services like auto, homeowners, life, and commercial insurance.

02. Committed to Excellence

With a customer-first approach, the agency has successfully expanded its operations from a single agency to managing 16 branches. Their dedication to transparency, customer satisfaction, and operational efficiency sets them apart as a leader in the insurance industry.



Challenges Faced

Overwhelming e-Doc Tasks

The client struggled with managing large volumes of e-doc tasks, worsened by the COVID-19 pandemic.

Delays and Errors

Document processing delays and inefficiencies led to errors and slower operations.

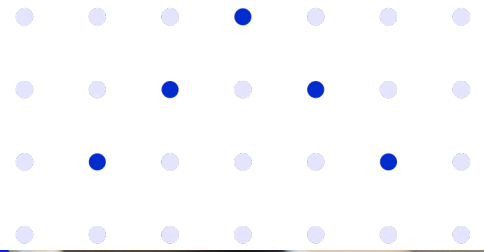
Lack of Advanced Features

Their existing system couldn't handle complex financial transactions or larger volumes.

QuickBooks Scaling Issues

QuickBooks couldn't meet the growing business demands, necessitating a transition.





Strategic Implementation by FBSPL

Finance Transition

We transitioned the client from QuickBooks to NetSuite, ensuring smooth integration for handling complex financial processes.

Data Migration

Comprehensive data migration included cleansing, mapping, and validation to ensure accuracy during the transition.

Phased Approach

A phased implementation minimized disruptions, starting with essential financial modules and gradually adding advanced features like CRM.

Training & Support

We provided ongoing training and support to ensure client teams could fully leverage the NetSuite system and its capabilities.

Significant Outcomes

Through a carefully planned implementation of NetSuite, we helped our client transform their operations, achieving remarkable improvements in efficiency, client satisfaction, and financial performance. Here are the key outcomes:

150%

ROI Increase

Achieved a significant return on investment by transitioning to NetSuite, boosting operational efficiency.

100%

Increase in Transaction Handling

Handled larger volumes of transactions effectively, doubling capacity.

80%

Client Satisfaction Growth

Client satisfaction improved significantly due to streamlined processes and better system performance.

90%

User Adoption Rate

Within 6 months, most of the users had adopted the new system, enhancing productivity and efficiency.

Key Benefits Delivered



Lower IT Costs

Through NetSuite's cloud-based infrastructure, the client experienced a 40% reduction in IT and maintenance expenses.

Greater Client Satisfaction

Client satisfaction increased by 80%, and the user adoption rate reached 90% within 6 months.

Higher Productivity

Transaction handling capacities doubled, and user productivity improved by 50% due to better features and comprehensive training.

Fewer Errors, Less Manual Work

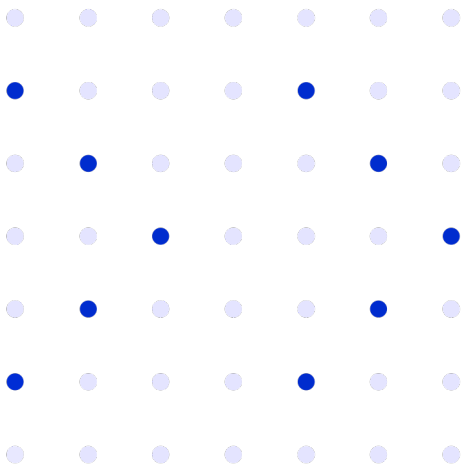
Manual work decreased by 60%, and errors dropped by 70%.



In their own words

"Appreciate your accuracy and impeccable quality of work. I express my satisfaction with the seamless collaboration."

VP, Finance



Conclusion and Future Steps

Ongoing Monitoring and Optimization

After successfully transitioning to NetSuite, our team continued to monitor key performance indicators (KPIs) to ensure ongoing satisfaction and system effectiveness.

User Satisfaction



System Performance



Expanding NetSuite Functionalities

Plans are in place to expand the use of NetSuite to other operational areas, including CRM integration and advanced financial reporting.

User Satisfaction



System Performance



Reach out 24/7

USA

2578 Broadway #568
New York, NY 10025-8844
Mo. +1-240-979-0061

UK

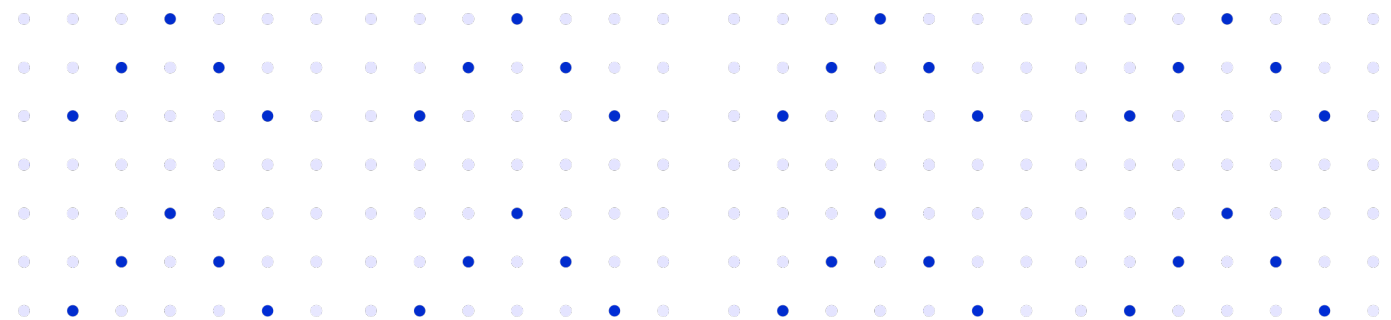
281 Kenton Rd
Harrow, Middlesex, HA3 0HQ
Mo. +44-788-331-8386

India

F-37, IT Park, MIA Extension,
Udaipur, Rajasthan, 313002
Mo. +91-977-277-9996

Canada

197 Orton Park Rd
Scarborough (ON), M1G 3H2
Mo. +1-240-979-0061



Thank You!