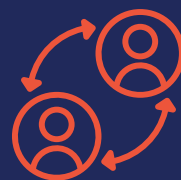


7 STEPS TO BETTER AGENCY TECH DECISIONS



PREPARE



ENGAGE



TALK



NOW WHAT? MOVE FRWD



IMPLEMENT



CRUSH IT

Remain focused on your people, processes, and your technology

It takes all three for any effective transformation

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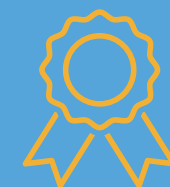
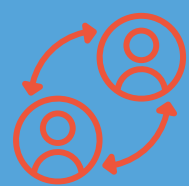
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7 STEPS TO BETTER AGENCY TECH DECISIONS



PREPARE

SLOW DOWN TO SPEED



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7 STEPS TO BETTER AGENCY TECH DECISIONS



1

PREPARE



- Update your business plan. Remain as true to your agency's goals as possible.
- Set your premium and/or revenue targets.
- Plan for your employee count over the next 3-5 years.
- Define your target business now and 3-5 years. PL or CL heavy? Life, Health, Benefits?
- Consider your number of agency locations now and in 3-5 years.

SLOW DOWN TO SPEED UP

- If you are a member of any networks or affiliations, discuss if they offer scaled pricing or other strategic benefits such as data/analytics and training.
- Make a list of current tech and note its value to your organization.
- Determine appropriate budget allocated for your AMS/tech.
- Document expenses that could be eliminated with the right AMS partner.

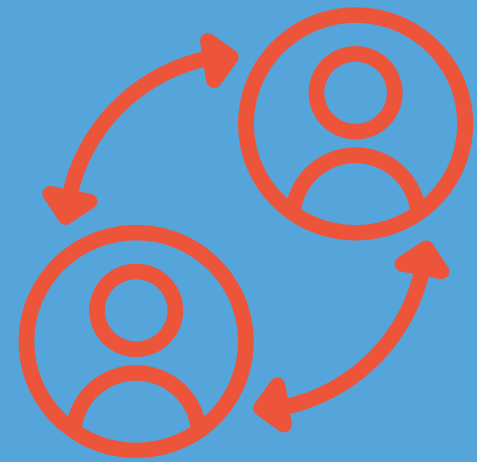


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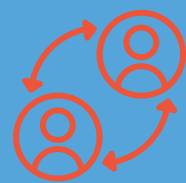


7 STEPS TO BETTER AGENCY TECH DECISIONS



ENGAGE

YOUR EMPLOYEES &
UNDERSTAND CURRENT STATE



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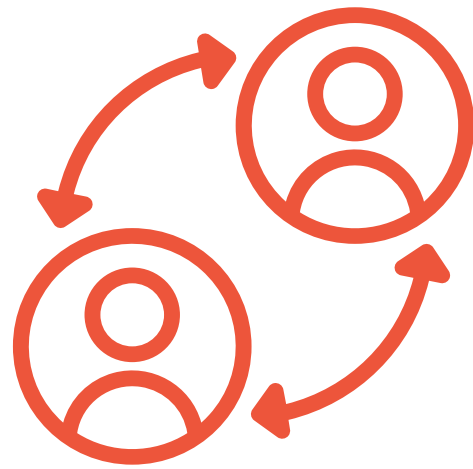
7 STEPS TO BETTER AGENCY TECH DECISIONS



2

ENGAGE

YOUR EMPLOYEES & UNDERSTAND CURRENT STATUS



- Ask your team what is working well.
- Understand their pain points.
- Determine if they fully utilize your current tools and technology? Why or why not?
- Use the data to validate KPI's such as hit ratios, NPS, New Leads, hold times, x-sell ratios.
- Share your plans and efforts to consider a new AMS/technology and why employee engagement is critical.
- Offer to give key employees a seat at the table during all stages of your assessment.



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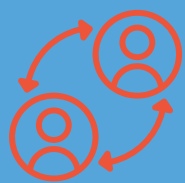


7 STEPS TO BETTER AGENCY TECH DECISIONS



TALK

TO YOUR CURRENT
TECHNOLOGY PARTNERS



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7 STEPS TO BETTER AGENCY TECH DECISIONS



3

TALK

TO YOUR CURRENT TECHNOLOGY PARTNERS



- Determine if you are using their most current version and most aligned pricing tier,
 - Ask your team if they have trained and updated on all current capabilities.
 - Document your learnings and ask your team how they leverage what they learned.
 - Implement any quick wins you and your team identified.
- Be objective about opportunities to terminate or unsubscribe from a product.
 - Identify features you were unaware of and can add with little/no expense.
 - Identify features that compete or contradict other tech you are using.
 - Clarify if they offer more seamless integration with a different provider, but you are using a similar product that does not integrate well.



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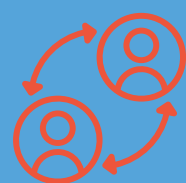


7 STEPS TO BETTER AGENCY TECH DECISIONS



NOW
WHAT?

BEFORE YOU MAKE ANY
TECHNOLOGY DECISIONS



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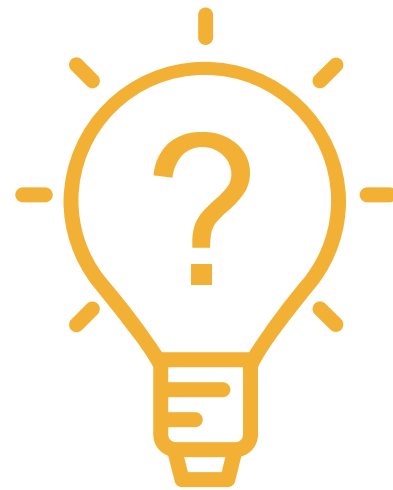


7 STEPS TO BETTER AGENCY TECH DECISIONS



4

NOW WHAT? BEFORE YOU MAKE ANY TECHNOLOGY DECISION



- Layout a plan aligned to your strategic goals – intentionality will help product vetting and decision-making.
- Be clear which specific part(s) of the plan you are going to focus.
- Document which internal processes are impacted, need to be built, eliminated, or altered.
- Have a change management plan – employee engagement is critical to the success of any change in an organization.
- Spend time calculating and understanding ROI.
- Consider other resources for insight – be willing to ask for referrals.
 - Your State Big I and their strategic partners.
 - Agents Council for Technology (ACT) and any of their supporting partners.
 - Other agencies with experience on this specific tool or change.
- Understand your budgetary situation ... as well as the opportunity cost of investing in new and enhanced capabilities.
- Remember: Less Can Be More.



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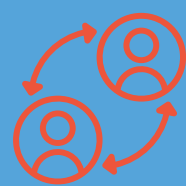


7 STEPS TO BETTER AGENCY TECH DECISIONS



MOVING
FORWARD

SELECTING A NEW
TECHNOLOGY PARTNER



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7 STEPS TO BETTER AGENCY TECH DECISIONS

PART 1

5

MOVING FORWARD

- Contact prospective technology partners and share your goals.
- Ask how they can support your goals and long-term plans.
- Ask if they can articulate how they may not be able to help and who they may not be able to serve.
- Understand their sales/RFP process before you dive in.
- Schedule a no-commitment demo.
- Consider executing an NDA

SELECTING A NEW TECHNOLOGY PARTNER

- Review their contracts for critical items like
 - Exit terms and conditions - notice timing, fees, data extraction when leaving etc.
 - Data conversion cost/process from current system.
 - Cybersecurity and breach reporting terms - definitions, timing, to whom.
- Inquire about their having a user group and getting involved.

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7 STEPS TO BETTER AGENCY TECH DECISIONS



MOVING FORWARD

SELECTING A NEW TECHNOLOGY PARTNER

PART 2

5



- Underwrite them as a business - time in business, financial health, testimonials, number of successful and unsuccessful implementations.
- Ask for details and demos about what data, dashboards, and reporting tools are available.
- Get clarity on their up/down time and service/support levels.
- Require details about their post-implementation training for your agency.

- Require a list of current functional integrations - IVANS, a CRM, your raters, etc.
- Make certain they support ACORD standards.
- Understand all costs, what is included vs additional, how they scale as you do.
- Understand their implementation timeline – when they can start, estimated completion date, and actual examples.



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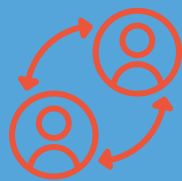


7 STEPS TO BETTER AGENCY TECH DECISIONS



IMPLEMENT

IT'S
TIME!



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7 STEPS TO BETTER AGENCY TECH DECISIONS

PART 1

6



IMPLEMENT

- Consider involving your legal resources in contract review - does it reflect all you negotiated and what you believe you are buying.
- Be clear of your rights & financial implications If they don't meet timelines or service levels.
- Address terminating current relationships if impacted by your change.

ITS TIME

- Align timing with terminated relationships to maintain business continuity.
- Make certain you understand any obligations set for you in the contract and discuss with your team – address if these are problematic.
- Notify your staff of your plans - at many points along the way.

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7 STEPS TO BETTER AGENCY TECH DECISIONS

PART 2

6

IMPLEMENT



- Layout plans specific to this implementation:
 - Data clean up.
 - Possible agency service interruptions and customer communications.
 - Clear responsibilities of your team members.
 - When key vendor activities will occur - onsite or remote.
- Establish employees who'll be most closely involved in the process.

ITS TIME

- Establish clear understanding of how training and support for your agency works – with your vendor and with your team.
- Detail all impacted processes, those that can be eliminated, net new needs, and any training.
- Consider roles and job description changes – people and process are just as critical for success as any technology.
- Recognize your employee's efforts and celebrate success.

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7 STEPS TO BETTER AGENCY TECH DECISIONS



CRUSH IT

YOU CAN DO IT!



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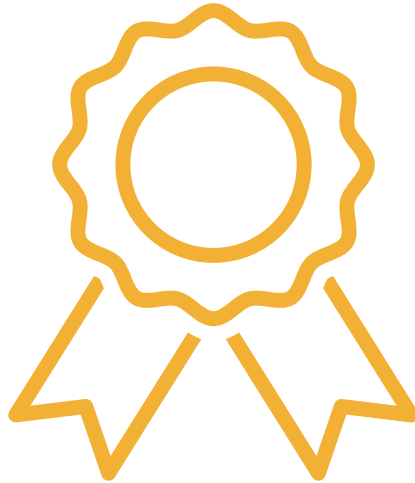


7 STEPS TO BETTER AGENCY TECH DECISIONS



7

CRUSH IT!



- Test, learn, and evolve.
- Be willing to change and try new things - nothing works perfectly the first time.
- Get regular feedback from your team – and act upon it.
- Stay in contact with your new partner, share feedback, ask questions.

YOU CAN DO IT!

- Be transparent with all new processes, expectations, and results.
- Consider process & data audits, offer feedback and coaching. Be willing to make changes.
- Keep iterating, learning, and changing.
- Crush it!



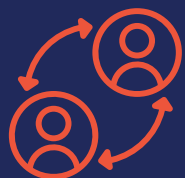
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