



A Checklist for Selecting Your Agency Management System

We've designed this checklist to help guide you through the process of evaluating an AMS – enabling you to match your needs with features and benefits that are most important for your business.



1. Assemble the Right Team to Access Your System Needs

As the agency owner or principal, it's likely that you will make the ultimate decision, but you also want to make sure that you have input from the users.

You will want to get perspectives from users who have varying technical skill levels and different jobs. You can bring everyone together and whiteboard the system features they want, or you can conduct a brief survey (using Survey Monkey or another online tool) to assess users' preferences and requirements. Their responses about what they like—and don't like—about the current system, workflows that still require manual processes, capabilities that customers are asking for, how users work (in-office, remote, traveling to clients) as well as processes for new policies, billing, endorsements, and quoting will help you determine your priorities and system requirements.

Your team should include:

- Producers
- Customer Service Representatives
- Selling CSRs
- Administration Team Members

2. Put Everything In the Context of Your Business and Strategy

Your short-term and long-term goals will also determine your selection and identify the features and benefits you need.

Some areas to consider:

- Do you plan to grow your business?
- Are you adding new lines?
- Do you have plans to add staff?
- What is your business mix?
- What are your sales production and closing rates?
- What is your customer retention rate?
- Where does the team work? In the office? Remotely?

3. Develop a List of the Features You'd Like Your New System to Have

Based on the input from your team in the context of your strategic plans and metrics around your business, you should be able to develop a list of features you'd like your new system to have.

Some of these include:

- Cloud access
- Mobile application
- Intuitive user interface
- Comparative rater
- Integration with other vendor partners
- Accounting and financial capabilities
- Management and sales reports
- eDocs and Messages
- Marketing capabilities
- Claims downloads

4. Research Your Options and Conduct Demos of the Finalists

You can't demo every product. Research the different options and identify which ones might be best. When you have your finalists, set up demos with the sales team to walk you through the platforms.

You should:

- Review the websites and capabilities of each system
- Look at online reviews for any potential red flags
- Compare platforms with your capabilities list to ensure they have all necessary features
- Make sure they show you all of the features most important to your needs
- Keep a tally of what you like and don't like about each platform
- If you need longer than the allotted demo time, set up a second or third session
- Don't be afraid to ask all of your questions

5. Make the Decision

Before making the final decision, there are several other important considerations.

Things to consider:

- Review the vendor's training and support capabilities
- Are the current customers satisfied?
- What is the process for customer service? How quickly does the vendor answer calls?
- Who will your day-to-day contact be?
- How will your team learn the new system?
- What are the plans for upgrading the technology?
- What is the pricing? Are there any extras that need to factor into your total cost?
- Talk with current customers to get their perspectives on service.

Selecting an agency management system is an important decision. If you find any red flags be sure to ask the vendor for more information. It's important to have stability and a long-term partnership. Once you have all the answers you need, review all of your notes, talk with your team and choose the platform that has the features you need that will help take your agency in the direction you want.