



Top 5 Steps to Getting the Most Out of Your Agency Management System

Many agencies don't maximize the potential of their agency management systems to acquire and retain clients. Follow these steps to make the most of your investment.

Growing your business in specific markets.

Building a larger customer base.

Better customer service.

Improving workflow efficiencies.



The ability to work anywhere.

Eliminating the need to rekey data.

Speeding up communications with carriers.

Better customer service.

Reducing the paper required to conduct business.

These are just some of the many benefits of your agency management system. At its core, your system will help you automate and accelerate your business—giving you more time to focus on customers. But most agents don't get the full value out of their systems. Only using the basic functions of your agency management system is like purchasing a smart phone but only using it for phone calls and texting.

Here are tips on how you can experience the full benefits of your agency management system

1. Clean Your Data

Make sure your data is accurate and up-to-date. Your system's functions and processes won't be of use if the data within the system is inaccurate or incomplete. Whether you're upgrading or switching systems, don't just transfer over all data from the old system. Review the information. Remove old data. Update information that has changed. Delete errors. Ensure only quality data is transferred to the new system. Then, conduct regular audits of the data in your system. Run reports so that you can identify incomplete fields or inaccurate data that needs to be corrected.

Top Takeaways:

1. Review all of your data before transferring to a new system or upgrading.
2. Run reports regularly to identify incomplete fields or information that needs to be corrected.

2. Take The Time to Train Your Employees

Training is key. It will help your employees become comfortable with the platform and introduce them to all of its functions. Set up a training plan for each employee and designate time within the workday for them to dedicate to learning the new system. Take advantage of all the training offered by your vendor. Consider taking booster— or tune up — sessions after your teams has been working in the new system for a while. Vendors are always adding new capabilities and this will help your staff take advantage of the latest features. Designate employee ambassadors for the new system, individuals who have greater knowledge of how it works and can help others at your agency.

Top Takeaways:

1. Take advantage of your vendor's training—get as many employees as possible involved.
2. Attend booster sessions to learn about new features and capabilities.
3. Appoint employee ambassadors who can help others

3. Enable and Use Downloads

Work with your carriers and IVANS to take advantage of policy and claims download and eDocs and Messages. These capabilities enable policy data and other information to be electronically added to your system and attached to specific customer files. In many cases, these features will enable you to eliminate paper and hard copy files, and to be more efficient in servicing clients. While not all carriers offer all lines of business, more carriers are adding capabilities every day.

Top Takeaways:

1. Work with your vendor to enable download.
2. Check with IVANS (Connection Report) and your carriers to set up download and eDocs and Messages

4. Ask About Integrations

In addition to your agency management system, you may be using another solution — such as a rater — that helps you write new business and serve customers. Your agency management system vendor may be able to integrate — or, in some cases, may already have integrated — the solution. By taking advantage of integrations like this, you can improve your workflow and eliminate the need to keep reentering information.

Top Takeaway:

1. Ask your vendor if it offers any integrations that could help save you time

5. Keep An Open Dialogue With Your Vendor

The best agency management systems are looking to continually improve their offerings and adapting their platforms to provide the best service for agents. Communicating with your provider can help them make the improvements you would like to see most. Stay in touch with your customer service representative. If there is a capability or feature you want, let them know. They might already have it and you were just unaware. Or it can be something that they are working on adding. Participate in webinars, user groups and other opportunities. These can connect you with others who are on the same platform and you can learn how other agencies are using the system and keep up to date with any new developments.

Top Takeaways:

1. Stay in touch with your customer service representative.
2. Take advantage of webinars, user groups and other opportunities to connect with system users.