



# 9 Things to Look for in an Agency Management System

...And key questions to ask  
before you buy

Partner 

# Your agency management system is the hub of your operations.

It drives your customer service, holds and processes vital data, and supports how you do business. It provides you with everything you need to keep your doors open and help you grow. With so much riding on your management system, don't you want the best for your agency?

Whether you've outgrown your current system, are underutilizing it or are just frustrated with ever increasing costs, this guide will help you understand other options and help pinpoint the capabilities you need to find the right provider for your agency.

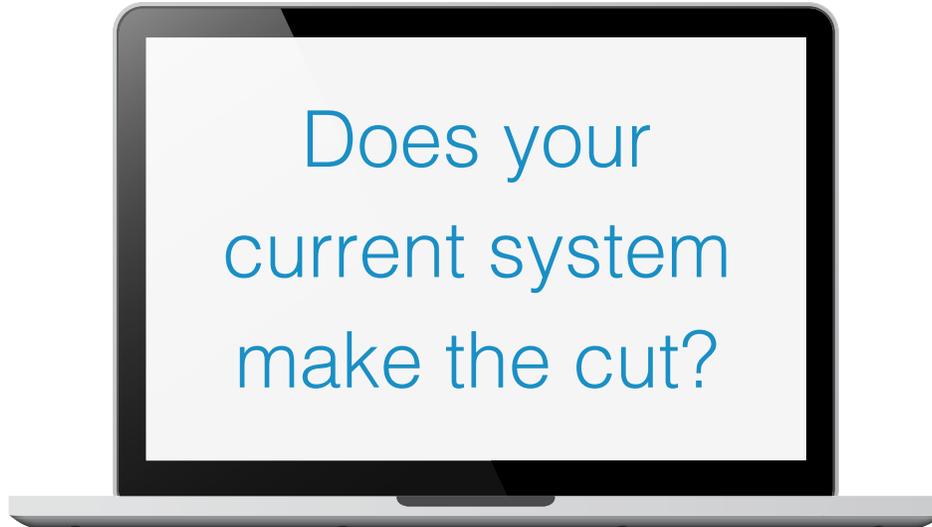


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# Agency Management System Capabilities: **What to Look For**

First, take a look at the capabilities that make a powerful agency management system. Although the ideal management system will vary slightly from one agency to the next, there are a few key items to look for regardless of your size or makeup.





# 1. Paperless Workflow

Greater efficiency through less paper is becoming standard for most agencies. Paperless agencies manage all certificates, policies, and other documents electronically—and utilize an agency management system that supports those processes.

## Paperless Benefits:

- ✓ Improves document organization
- ✓ Speeds up document search, locating items in seconds
- ✓ Saves money on printing and storage
- ✓ Benefits customer service by quickening the flow of information

## What to Look For:

- ✓ Easy document scanning
- ✓ Quick document upload and download
- ✓ Intuitive document drag and drop



## 2. Cloud Storage and Security

Once a new frontier, most businesses have moved a good portion of their operations to “the cloud.” This digital storage network serves to hold and protect your agency’s data. Modern agency management systems are hosted in [the cloud](#), providing ample storage and top-notch cyber protection.

### Cloud Benefits:

- ✓ Protects agency data from cyber threats
- ✓ Recovers information quickly after natural disaster, fire, or other catastrophic events
- ✓ Provides agency users with anywhere access to system
- ✓ Supports agency growth, scaling up easily

### What to Look For:

- ✓ Redundant data backups
- ✓ Around the clock security
- ✓ Compliance with industry and government security standards
- ✓ Virtually unlimited storage



# 3. Data Synchronization & Downloads

The days of manually entering policy and certificate information are gone. Data synchronization means connecting with carriers directly for immediate, updated data download. [Real Time downloads](#) access carrier billing, claims, ratings, policy information and other data for seamless, secure transactions..

## Synchronization & Downloads Benefits:

- ✓ Cuts out hours of phone calls to connect with carriers
- ✓ Eliminates significant time spent manually entering information
- ✓ Decreases E & O issues

## What to Look For:

- ✓ Ability to manage employee and carrier passwords
- ✓ Connection with ACORD forms
- ✓ Capability to send a policy change for quote or submission
- ✓ Access to claim status



# 4. Integrated Accounting

Accounting is a major part of your agency's operations – why keep it separate from your agency management system? [Integrated accounting](#) seamlessly connects production information, billing, payments, and other income/expense items with your management system.

## Integrated Accounting Benefits:

- ✓ Improves workflow and saves keystrokes
- ✓ Cuts income and expense reporting time
- ✓ Provides more cohesive picture of customer history
- ✓ Eliminates dual entry for improved E & O protection

## What to Look For:

- ✓ Multi-level commission split capability
- ✓ Branch, division, and department segmentation
- ✓ Agency and producer reconciliation
- ✓ Custom reporting options



# 5. Email Integration

As with integrated accounting, syncing email to your agency management system just makes sense. It saves time and speeds up processes, allowing you to address needs faster. The majority, if not all, of your agency communications go through email. Capturing and saving those communications with [email integration](#) speeds up operations and improves service.

## Email Integration Benefits:

- ✓ Streamlines workflow, eliminating need to toggle between system and email
- ✓ Provides complete communication records
- ✓ Ensures records are consistently updated, improving E & O protection

## What to Look For:

- ✓ Seamless integration with document management
- ✓ Easy document attachment from email system
- ✓ Intuitive design for fast onboarding



# 6. Mobile Access

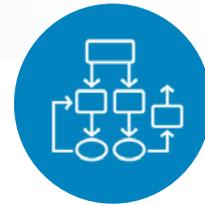
Mobile access has quickly moved from a “nice to have” to a “need to have” in recent years. Producers especially benefit from [mobile access](#), immediately locating the information they need when away from the office.

## Mobile Benefits:

- ✓ Provides anywhere, anytime access to agency management system
- ✓ Frees up office staff, who no longer have to relay information for those on the road
- ✓ Allows producers to answer questions in the field, improving customer service

## What to Look For:

- ✓ Access via iPad, iPhone, and Android devices
- ✓ Capacity to view client information, policies, notes, etc.
- ✓ Ability for those in the field to edit entries



# 7. Personalized Workflows

One system does not fit all. No matter the capabilities, if an agency management system can't adapt to your agency processes it may be more of a burden than a help. Look for a system that allows for [personalized workflows](#), adjusting to your agency's needs.

## Personalization Benefits:

- ✓ Reduces workarounds
- ✓ Speeds up onboarding and training
- ✓ Supports agency expansion and growth

## What to Look For:

- ✓ Flexible naming conventions
- ✓ Adaptable data entry and access paths
- ✓ Adjustable individual user dashboard views



# 8. Comprehensive Lines of Business Support

Building capacity is key to growth. Too often a management system exhibits a robust infrastructure for one line of business but is lacking in the other. Whether your agency is heavy personal, almost all commercial, or an even split, you need a management system that supports all lines of business. Complete lines of business support helps your agency run better while building your potential.

## Lines of Business Support Benefits:

- ✓ Creates room for agency growth
- ✓ Enables cross-selling opportunities
- ✓ Increases agency productivity

## What to Look For:

- ✓ Mass certificate email
- ✓ Real Time carrier access
- ✓ Integrated personal and commercial lines rater
- ✓ Direct lines download



# 9. Ease of Use

Although all new systems will have a learning curve, an intuitive and user-friendly one will shorten the arc. Ease of use is achieved in time, but a great system will cut it from months to weeks. An easy to navigate management system ties together the above capabilities and delivers them in straightforward way you and your staff can quickly understand.

## Ease of Use Benefits:

- ✓ Faster employee onboarding
- ✓ Fewer process workarounds due to confusing pathways
- ✓ Increased productivity

## What to Look For:

- ✓ Instinctive design and functionality
- ✓ Positive employee interaction with system demos
- ✓ Proactive provider that listens to and delivers on capability requests

# Agency Management System Provider: Questions to Ask

An agency management system is only as good as its provider. Great capabilities mean nothing without a provider that supports you and helps your agency grow. The right questions can steer you towards a company with knowledge, integrity, and a vested interest in your agency's success. These questions will help you identify the provider that has your back.



# 1. Service

Excellent service starts with conversion preparation and support, extending to 24/7 access to [service resources](#). Providers should respond to issues quickly and efficiently through a real person. Individualized service means connecting your agency with a team of professionals who know your history and work with you to optimize your business.

## Questions to Ask:

- ✓ What is your conversion process like?
- ✓ Is there a written conversion plan?
- ✓ What is the expectation on agency staff for “clean up”?
- ✓ How many conversions have you performed? On what systems?
- ✓ What is the quantity and quality of information converted?
- ✓ How can I contact your support team with issues?
- ✓ How do you respond to and track issues?

## 2. Innovation

The best providers take care of your agency today and [support your growth](#). Your feedback and communication should be welcomed by the provider and you should expect to see changes in software reflecting your feedback. Also, a good provider stays on the cutting edge, providing regular updates to keep you up to speed in the industry.

### Questions to Ask:

- ✓ When was your latest update? What did it include?
- ✓ How are customers involved in creating or testing enhancements?
- ✓ When do you plan to release your next update?
- ✓ What are your future goals as a business?

# 3. Training and Support

[Targeted training](#) starts with system implementation and should continue with each system update. Your provider should ensure your whole staff is comfortable with your agency management system through continual access to training. Training should be offered both in person and online to make it convenient for you.



## Questions to Ask:

- ✓ How do you prepare agencies for system updates?
- ✓ How do you deliver training? In person? Online?
- ✓ How do you tailor training?
- ✓ How often is training offered?

# 4. Affordability

Your last look should be at price. Find a provider offering competitive pricing that works with your business. Purchasing an agency management system is an important investment. Don't let a price increase keep you from a [great system and quality provider](#), just be sure it's worth the money. Be clear on all associated costs, including start-up and licensing.



## Questions to Ask:

- ✓ What are startup costs? Is data migration included?
- ✓ What capabilities are included in the base price?
- ✓ What can I add on later? At what cost?
- ✓ What are licensing costs? Carrier downloads?

# Choosing an Agency Management System

Once you've covered the basics on capabilities and provider qualities, take your time in selecting the best system and partner.

***There is no limit to how many conversations you can have with potential providers, references, and your staff.***

You want to serve your customers better. Wait for a system that will help you achieve that goal. Keep your standards high, searching for a system that is just as great as your agency.



## About Partner XE

Supporting downloads from over 325 carriers, real-time interaction, integrated agency accounting, and much more, Partner XE is a full-featured agency management system at an affordable cost for the independent insurance agency.

## About SIS

Headquartered in Columbus, Ohio, Strategic Insurance Software (SIS) is the team behind Partner XE, an innovative web-based insurance agency management system helping independent agents break free from the status quo. Partner XE is easy to use, streamlines workflows and enables agencies to run their business more affordably and effectively. Built on a foundation of strong technology and exceptional service, we're moving forward with a constant eye on innovation that will make independent agents' lives easier. For more information, please visit [www.sisware.com](http://www.sisware.com).



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