The First 20 Questions to ask about your Insurance Agency Technology

BY Billy R. Williams, Ph.D., President: Williams Family Investment Group &

Inspire a Nation Business Mentoring

www.inspireanation.org

- WHEN DO I USE MY CRM vs MY AGENCY MANAGEMENT SYSTEM?

Use the 20 questions I am about to go over to determine what tasks and functions should happen in your CRM vs the Agency Management System.

- **1. What is the best tool to use to send email templates to customers and prospects?**
- **2. Can my email templates have merge fields / tags**
- **3. What is the best tool to send text messages to customers and prospects?**
- **4. Can the text messages have merge fields / tags?**
- **5. Can I send an email template that has merge fields or tags based on a specific trigger or event?**
- **6. Can I send a text message template that has merge fields or tags based on a specific trigger or event?**
- **7. Workflow Automation: Can a series of email templates automatically go out on a specific schedule?**
- **8. Workflow Automation: Can a series of text message templates automatically go out on a specific schedule?**
- **9. What's the best tool to pull reports such as upcoming renewals, upcoming birthdays, cross-sell, and new customer reports?**
- **10. Can a mass email go out to contacts from a report or audit?**
- **11. Can a mass text message go out to contacts from a report or audit?**
- **12. What is the best tool to send an Electronic Signature form?**
- **13. What's the best system to create a task for a customer's record?**
- **14. Can the task that we create be assigned to more than one team member?**
- **15. Will tasks that are created show up on a:**

Dashboard Widget,

Outstanding Tasks Log,

- ***16. Can I run a report that shows my non completed tasks?***
- **17. Which of my agency technology tools integrate with other 3rd party technology tools such as:**

Phone Tools

Video Tools

Postal Mail Tools,

Etc.

- **18. Will the integration be easy?**
- **19. How many total fields or tags in my technology tools can be merge field into an Email Template, Document, or Form?**
- **20. What capacity for document storage does my system have?**

Questions to Ask of Your Agency Management System

- **How many of my most important carriers can I download information from?**
- **What level of coverage information can I download from my carriers?**
- **What level of household information can I download from my carriers?**
- **What level of policy information can I download from my carriers?**
- **Can I create and send a merge field email template or form that pulls in current customer policy information, coverage limits, and contact data?**

WHEN ASKING ABOUT YOUR INSURANCE AGENCY TECH STACK . . .

Don't Assume! The moment you start assuming, you stop asking questions.

Billy R. Williams, Ph.D.,

President/CEO

Williams Family Investment Group

and

Inspire a Nation Business Mentoring

www.inspireanation.org