Tips for technology success

Before you make any technology investments, it's important to first consider your agency's unique goals to make sure your systems will work for you today and in the future. **Then practice these "people, process and technology" tips as you introduce new technologies to your agency:**

People

» Drive adoption by **emphasizing positive results from the technology** and use your position as your agency's technology leader to consistently reinforce its value.

» Establish teams that **own the setup, rollout and ongoing use of each new investment.** Giving staff members ownership of the new technology increases the likelihood that they'll adopt new practices.

» Provide **ongoing communication and training for all users** at every step of the way.

» Regularly **participate in user support forums or training**. Check with your AMS vendor for information about online user groups, which can be great resources for finding ways to extend your AMS capabilities.

Process

» Make a flowchart of your current agency processes. Then create "what if?" flowcharts to **help identify points in your process where automation could help you be more efficient**. For instance, if renewals are logjams, think about ways that technology could improve them.

» Build and publish calendar milestones for when new technology will be introduced to your team and for when teams will begin training and adopting it. **Add quarterly checkpoints** for encouraging feedback and recommendations.

» Create collaboration opportunities for your agency's team leaders, producers, account managers and service representatives, who together can **identify how and when the technology is used** across your organization.

» **Develop curriculum** to introduce new and current employees to your agency's systems.

» Plan how you'll **deactivate login credentials** for outgoing staff.

Technology

Make it a goal to connect your current technology to third-party data sources that **enrich prospect and client records**.

Set up automated triggers to perform repetitive tasks. Set up triggers, too, to remind and encourage agency staff members to **reach out to clients to cross-sell, upsell, strengthen relationships** and demonstrate expertise.

If you haven't already, put all your systems online ("in the cloud") and be sure to **use multifactor authentication** to keep your information secure.

Learn more at **Agency Forward**