

DATA MIGRATION CHECKLIST





Hi,

Thanks for downloading our data migration checklist. If you're searching for a new agency management system (AMS), then there's probably a lot on your mind.

Use this tool to ensure you're asking **all** of the important questions regarding migration in (and out!) of the new AMS. The detailed questions sheet will guide you on which questions you should be asking as well as what you can expect in regards to answers and provide you with additional follow-up questions.

Then, use the checklist to take notes while you demo and trial different systems. Check the boxes for a quick look to see if the vendor does or does not support different needs you may have.

Print out as many copies as you'd like to compare and contrast the vendors once it comes time for a decision. This will help you make the best decision and choose the right software for your insurance agency.

Sincerely,

The  agency**bloc** team

1

How do I get my data into the system?

The vendor should have a simplified solution to move your data over to their system. Excel is a good way to go as most management systems will be able to read a basic Excel file.

2

Does my file need to be in a certain format?

Generally, a .csv file is the best way to package your data for migration. This is also a great opportunity for you to clean your data and get it into a standard format.

3

Can I import multiple policies for one client?

This should be doable. You should be able to add additional rows with the same client but different policies in the file. Make sure to ask if you can add "custom fields" for additional areas you need to track if the system doesn't already offer it (*i.e. RX drug plan, power of attorney, etc.*). This is important to know so you can build your spreadsheets correctly.

4

What about my notes and attachments?

This should also be doable. Make sure you ask about where they are stored and if you can easily extract them should you choose to leave that vendor in the future.

5

Is there a separate fee for data migration?

Some vendors will have a flat fee whereas others will give you a quote. The cost will highly depend on the system you're coming from, the size of your book, and the state of your data (organized vs. messy).

6

How long will the migration take?

It will vary software to software, but it can be as short as a couple of days or as long as a couple of weeks. It will depend on the system you're coming from, the size of your book, and the state of your data. It also depends how responsive and prepared you are.

7

How easy is it for me to get my data out?

One of the most important questions to ask. Often, there are hidden costs, delays, and difficulties when you try to extract your data from a system. **BEFORE YOU BUY** make sure to ask about getting your data back out and if your data is still **100% yours**.

Software: _____

How do I get my data into the system?

Does my file need to be in a certain format?

File format: .csv Excel Other: _____

Templates Available? Yes No

Can I import multiple policies for one client?

Can you create custom fields? Yes No

What about my notes and attachments?

Can they transfer? Yes No

Can they be exported? Yes No

Where are they stored? _____

Is there a separate fee for data migration?

Estimated fee? \$ _____

How long will the migration take?

Estimated time? _____

How easy is it for me to get my data out?

Is my data still **100%** mine? Yes No

Additional Notes
