

5 STEPS TO TAKE BEFORE YOU ENGAGE WITH VENDORS

1. Clarify Your Business Goals & Growth Plan



Update your business plan to reflect current and future goals

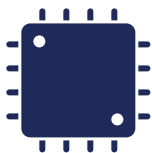


Set 3–5 year targets for revenue, premium volume, and headcount



Define your target book of business now and in the future (e.g., PL vs. CL, Life, Health, Benefits)

2. Assess Your Current Tech Stack



List all current technologies in use and rate their value to your operations



Identify underutilized tools and areas for improvement



Document costs and note which could be eliminated with better-integrated solutions



Determine your budget for new tech and support—include both upfront and recurring costs

PREPARING YOUR BUSINESS FOR SMARTER TECH DECISIONS

3. Evaluate Internal Readiness



Survey your team to understand what's working and where pain points exist



Identify gaps in training or underuse of current systems



Review KPIs to see where inefficiencies lie (e.g., hit ratios, lead response, hold times, NPS)



Be transparent with your team—share that change may be coming and invite their input

4. Start Thinking About AI



Define your agency's vision—how do you want to show up to clients and staff in an AI-powered world?



Start educating yourself through podcasts, webinars, your Big "I" state association, and ACT



Be honest about team readiness—are you equipped to adopt AI or still exploring?



Begin drafting internal AI guidelines and involve legal to address risk and compliance



Recognize that team members may already be using AI tools—bring that usage into the open and shape policy accordingly

PREPARING YOUR BUSINESS FOR SMARTER TECH DECISIONS

5. Align Internally Before Moving Forward



Identify which business processes will be impacted or need to change with new tech



Clarify the goals you want the technology to support—avoid “tech for tech’s sake”



Create a simple change management plan to guide employee engagement during future implementation



Begin gathering referrals from peers, state associations, and ACT to inform future vendor conversations



Start thinking about ROI— what outcomes matter most (efficiency, growth, client experience)?