

ANNUAL TECH-UP



20 Areas Insurance Agencies Need to Check ASAP

BUDGET

- Run a book of business report in AMS. Compare premium and revenue YOY. Determine/review annual sales goals. YES NO
- Determine/review technology budget. Consider a 3-5% increase. YES NO
- Review all available analytics, including balance load and referrals. Consider needed hires. YES NO
- Review all paid tech subscriptions and ensure each is still needed. Create a list of all subscriptions in one place. YES NO
Note: Credit card statements are a good place to find recurring charges.

CYBERSECURITY

- Agency cybersecurity program is up-to-date and compliant with state regulations. YES NO
- Every computer (internal & remote) has an up-to-date antivirus program running. Set a calendar reminder for renewal dates. YES NO
- Schedule awareness training for staff. Note: KnowB4 is a great tool. YES NO
- Have a data purge policy. Make sure you're following it. YES NO

OPERATIONS

- Perform a data integrity check: customer database has been reviewed, and duplicates removed. YES NO
- Call IT or MSP to review current Office 365 configurations and ask what should be updated. YES NO
- Check on software updates and integrations, review version numbers and latest releases. Plan to implement one or two enhancements this year. YES NO
- Change passwords on all banking accounts, AMS, and carrier portals. This should be done at least annually. YES NO
- Review who has access to carrier portals and remove unneeded access. YES NO
- Create a tech onboarding and offboarding procedure for staff to ensure system integrity. *(Maintain a list of what access each team member has and have a procedure to terminate it).* YES NO
- Printed copy and flash drive copy of disaster plan that includes contact information is offsite. YES NO
- Texting policy is in handbook for team members who text customers. YES NO
- Have on file for each customer: permission to receive policy docs electronically, & permission to receive text messages, if applicable. YES NO
- Email disclaimers and voicemail are up to date. YES NO

MARKETING

Make sure at least 2 agency members (including a leader) have admin access on all social channels.

YES NO

Ensure all the links on your website are working correctly.

YES NO

Review marketing campaigns, mailers, and automated emails for updated language and the correct recipients.

YES NO

Additional Resources:

BUDGET

Catalyit's Budgeting for Tech Webinar

TechTips: How to Build a Strong Budget for Your Agency

CYBERSECURITY

Catalyit's Cybersecurity Guide

MARKETING

Catalyit's Marketing Guide

As with most of your agency technology, it is much better not to operate in a bubble. Share this list with your team. Encourage feedback. Spread the work, and document every new process in a word document so that your team is on the same page and the heavy lift of the first time doesn't have to be repeated.

Need Help? Angela & George are here!

Email them at hello@catalyit.com



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