CHANGE MANAGEMENT

SIS

strategic.insurance.software

Agency Management Systems

CONTENTS

Transitions are a necessary part of growth and improvement. The longer change is avoided, the more difficult the transition becomes!

This eGuide is a helpful tool in guiding you through management system changes in your independent insurance agency.

The Big Question(s)

Get your agency ready for change!

Start by asking yourself:

1 What are the signs?

- Constant frustration
- Frequent complaints
- Wishing for something better
- Underutilizing the current system
- Paying for more than you need

2 Who do you consult?

- Staff
- Peers
- Provider

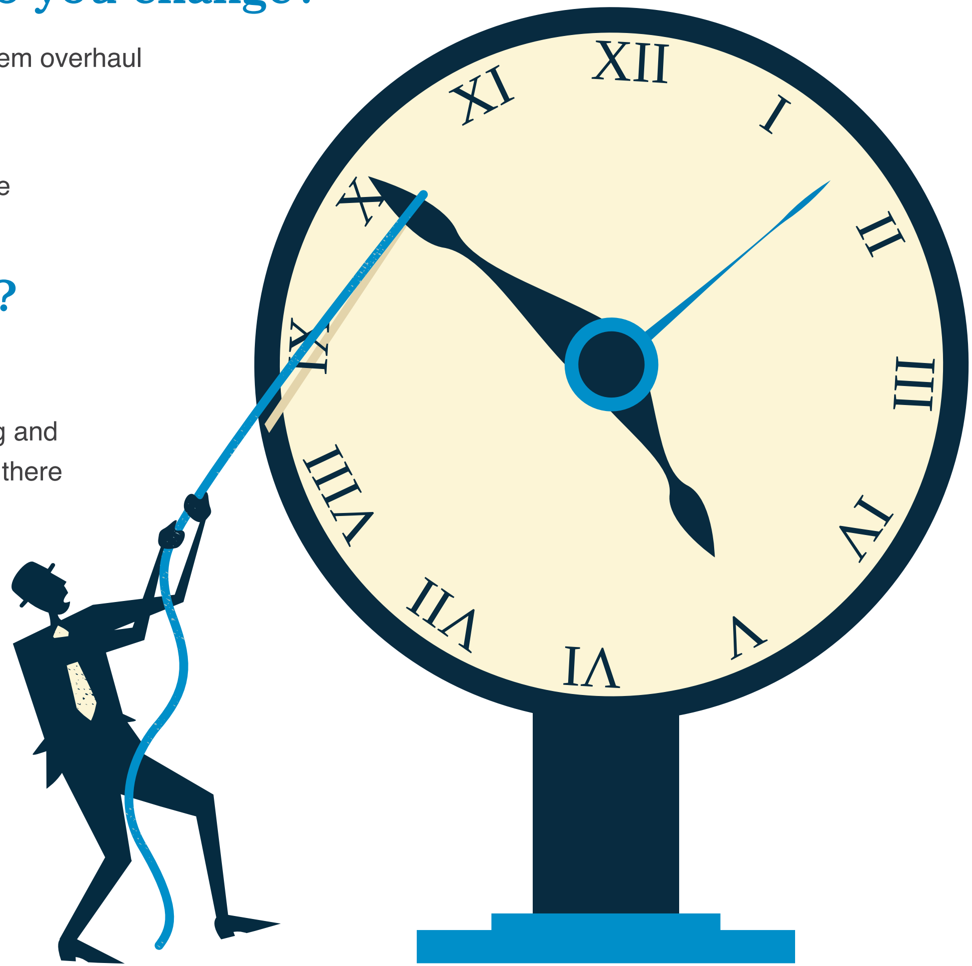
SIS

3 How much do you change?

- Small tweaks or system overhaul
- Budget is a factor
- Plan out and prioritize

4 Can we do it?

- YES!
- Preparation, planning and patience will get you there



The Next Steps

Investigate and Decide

Communicate and Consult with Staff

Stay in Contact with Your Provider

Make a Plan

Develop a Timeline

Aspects to Consider:

When will the transition start? How long will it last?

Who are the point people?

How will it happen? All at once, or in segments?

How and when will staff training happen? Is client training needed?

How and when will new system evaluation take place? How will adjustments be made?

The Transition

SIS

Successful transitions require:

- **Foresight**
  Create a plan, and be flexible when needed

- **Communication**
  Stay in contact with your provider, staff and clients

- **Commitment**
  There will be moments of doubt—expect difficulty and also expect the situation to improve

- **Patience**
  It takes time to adjust to a new system

Find out your provider's training details such as:

Training cost: one time fee vs. pay per training

Training packaging: online, in person or both

Training frequency: one time training vs. monthly or annual trainings

Other training resources: webinars, online tutorials, personal training rep, etc.

The 5 Rules of Change

1 Things Will Go Wrong

Accept it, report it, fix it, and move on

2 Comparison is Dangerous

Living in the past is not a formula for success, let go and accept the change

3 Someone Will Hate It

Hear out complaints, make changes if needed, just listen if not

4 Use Your Resources

Includes personalized training, online tutorials, user groups

5 Your Provider Is Your Friend

They know your system and have gone through this before

To help your agency prepare for change, the best thing you can do is be well prepared and anticipate the challenges that can be associated with change. Having a good provider is essential to making a smooth transition, and the SIS support team believes wholeheartedly in providing you with constant support throughout your system transition, including offering a personal customer service representative and personalized trainings for your staff. **Connect with us today to get the conversation started!**

About SIS

Headquartered in Columbus, Ohio, Strategic Insurance Software (SIS) is the team behind Partner XE—an innovative and secure web–based insurance agency management system that helps independent agencies streamline workflow and grow their business. Built on a foundation of strong technology and exceptional service, we're moving forward with a constant eye on innovation that will make independent agents' lives easier.

About Partner XE

Supporting downloads from nearly 300 carriers, real time interaction, integrated agency accounting, and much more, Partner XE is a full–featured agency management system at an affordable cost for the independent insurance agency. For more information, please visit **www.sisware.com**

4181 Arlingate Plaza, Columbus, Ohio 43228 | 800.747.9273 | **www.sisware.com**