



11 Questions to Ask About Data Migration



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 the essential questions about migration in (and out!) of your new AMS. The detailed questions sheet will guide you through which questions you should be asking, what you should be looking for within answers, and provide you with additional follow-up questions.

Then, use the checklist to take notes while you demo and trial different software. 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. By doing this, you can make the best decision and select the right software for your insurance agency.

What is data migration?

Data migration is “the process of moving data from one location to another, one format to another, or one application to another. Generally, this is the result of introducing a new system or location for the data.”

For life and health insurance agencies, these locations can include:

- Paper files
- Spreadsheets (Excel or Google)
- CRM software
- Homegrown management software
- An agency management system

To upgrade to new software, you must go through a data migration. On the following pages are the questions you should be asking with responses you should look for. Then, you’ll find a checklist at the end. Use the checklist during your demo with each vendor to ensure they can help make your data migration seamless.



1

Who needs to be involved in the process?

The first question we must answer, from both sides, is who needs to be involved in the migration process. For some vendors, one person from each might be enough, but for others, the migration process might be a large undertaking and will need a team of people. Identify these people early on and verify they understand their responsibilities to ensure the migration process is smooth and efficient.

2

How do I get my data into the system?

The vendor should have a simplified solution for you to transfer your data from your current system to the new one. A spreadsheet or .CSV file is sometimes required in order for your data to be extracted and put into the new system. Other times, a custom migration may be necessary.

3

How clean does my data need to be?

Do you have lots of duplicate data in your current system? Is there data that's been untouched for several years that you don't need anymore? If your data needs cleaning up, potential vendors may suggest (or require) that that's taken care of before a data migration. Which leads us to the next question...



4

Does the file have to be in a specific format?

Often, a .CSV (Commas Separated Values) file is recommended.

This is an excellent opportunity for you to clean your data and create consistency in naming carriers, product types, statuses (prospect, lead, etc.), and more. This effort can make a huge difference in how fast you can get up and running.

5

Can I import multiple policies for one client?

You should be able to add more rows with the same client's name, but different policy numbers and products, to be grouped together within the system. But, this depends on the structure of the system you're moving to.

6

Can I restrict what I migrate or move multiple databases?

Your data migration depends heavily on what you can extract from your current system(s). If you want to restrict what you're moving (i.e., only leads, prospects, and clients) or want to move multiple databases, it should be doable. Have a conversation with your sales rep and the data team to see what you can pull over, where you have limitations, and set proper expectations.



7

Do you have migration templates available?

Most vendors have templates available that are best suited for their system's import. Ask about additional fields, like custom fields, that may not come on the standard template but are necessary for your book of business.

8

What about notes, attachments, emails, tasks, etc.?

This is a very pertinent question as notes, attachments, emails, tasks, etc., may not always come out the same way as your other data points. After you ask if they can be transferred over, your next question must be: where are they stored? If you ever want to export them out of the system, you will need access to them in whatever location they are housed.

9

Is there a separate fee for data migration?

The cost of your data migration will highly depend on the system you're coming from, the amount and type of data you have, and the state of your data. There are usually different levels of migration as well—manual, standard, or custom. Each of those could mean different fees, whether it's flat or quoted. This would also apply if you're migrating multiple databases.



10

How long will the migration take?

The length of time depends on the system you're coming from, the amount of data you have, the state of your data, the availability of the support staff, and, most importantly, you.

You can be a big dependent on the timetable for how long a migration will take. Factoring in how you prepare your data (refer to number four on this list) and how responsive you are can help cut down the wait time considerably.

11

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

This is the most critical question to ask. Many times, the hidden costs, delays, and difficulties during the migration do not come from the software you're migrating to; they come from the one you're moving *from*. Ask any vendor you're thinking of doing business with:

- How easy is it to get my data back out?
- Who is the owner of the data once it's in the system?
- What costs are associated with retrieving my data?
- Are there limitations to what I can export (notes, attachments, emails, tasks, etc.)?



Software: _____

Who needs to be involved in the process and what are their roles?

How do I get my data into the system?

How clean does my data need to be?

Does my file need to be in a certain format?

File format: ☐ .CSV ☐ Excel ☐ Other: _____

Templates Available? ☐ Yes ☐ No

Can you create custom fields? ☐ Yes ☐ No

Can I import multiple policies for one client?

Can I restrict what I migrate or move over multiple databases?

Can you move multiple databases? ☐ Yes ☐ No

Can I migrate my notes, attachments, emails, tasks, etc.?

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