



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 into (and out of!) your new AMS. The detailed questions sheet will guide you through:

- Which questions to ask
- What you should be looking for within answers
- Additional follow-up questions

Then, use the checklist to take notes while you demo and trial different software solutions. Check the boxes for a quick look to see if the vendor supports your specific needs.

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.

# 11 Questions to Ask About Data Migration

## 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 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. Follow along with the questions you should be asking and the 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.



# 11 Questions to Ask About Data Migration

## 1. Who needs to be involved in the process?

The number of people involved in the data migration process depends on your agency's size, the amount of data in your book of business, and your technology vendor. Sometimes, one person is enough; other times, you'll need a whole team playing different roles. Common roles to include on your data migration team are:

- Data Owners
- Functional Team Members
- Data Migration Team Members
- Program Management

Once you've determined who will be involved, it's also important to identify what their role in the process will be.

## 2. How do I get my data into the system?

The data migration process will vary from one vendor to the next. However, your technology vendor should present the different options for you to review and choose from.

When moving to a new agency management system (AMS), your options will likely include:

- Manual entry
- Spreadsheet import
- Custom migration

Each approach has its advantages and requirements. Be sure to review these with your potential vendor to ensure you have a solid understanding **before** you start the process.





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## 3. How should I organize my data?

It's always best practice to clean your data **before** your data migration. Having clean data can make the migration process faster, more efficient, and, in some instances, less expensive.

Here are some ways you can clean up your data:

- Remove duplicate contacts and policies
- Delete outdated or irrelevant records
- Standardize formatting for names, addresses, phone numbers, ID numbers, and social security numbers
- Verify and update important information, such as policy statuses and whether the contact is an active client

As the saying goes, “*garbage in, garbage out.*” Basically, you get out what you put in. If you start with good, clean data, your new system will have accurate and reliable information from the beginning!

## 4. Does the file have to be in a specific format?

Usually, your vendor will provide a standard format guide. Often, they require an Excel-based file, such as .CSV or .XLSX.

Another crucial piece of the puzzle is the format of the data. Consistent formatting means every data entry follows the same guidelines throughout your files. For example:

- **Capitalization:** Use standardized formatting (either “SMITH” or “Smith,” but not both)
- **Terminology:** Maintain consistent language throughout (like always writing “Prospect” as a complete word rather than abbreviating)



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- **Dates:** Follow the same pattern consistently (i.e., MM/DD/YYYY format)
- **Phone numbers:** Use identical formatting throughout (i.e., XXX-XXX-XXXX)
- **Social security numbers:** Use consistent formatting (i.e., XXX-XX-XXXX)
- **Column organization:** Keep one type of information per column (Column A = First Names, Column B = Last Names, etc.)

Maintaining clear organization will reduce errors in the migration process and make the data transfer smoother.

## 5. Can I import multiple policies for one client?

If your system supports multi-policy grouping, then you should be able to import that data. Usually, you add more rows with the same client's name but different policy numbers and products. Connect with your vendor to confirm the process you should follow.

## 6. Can I restrict what I migrate or move multiple databases?

Data export relies on the capabilities and processes of your current system.

**Beware, not all systems allow you to export all of your data.** If you're combining multiple databases, you'll need careful planning to prevent duplicates and keep data linked. Collaborate with your vendor to learn about your transfer options, restrictions, and expected outcomes.

## 7. Do you have migration or import templates available?

Most vendors have templates available that are best suited for their system. Ask about additional fields, such as custom fields, that may not be included in the standard template but are critical for your data profile.



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

Before switching systems, verify that your current files and information can be transferred over. Be sure to ask:

- Can these items be transferred?
- What format are they currently stored in?
- Will that format work with your new system?
- Where will they be housed in the new system?
- Can you access and export them later if needed?

Some information might transfer easily (like attachments), while others (like call recordings or tasks) may require extra steps. Get specific answers about what will transfer before you make the switch to prevent problems down the road.

## 9. Is there a separate fee for data migration?

The cost of your data migration will highly depend on the system(s) you're coming from, the amount and type of data you have, and the state of your data. There are usually different types of migration as well — manual, standard, or custom. Each of those could mean different fees, whether it's flat or quoted.

## 10. How long will the migration take?

The timeline of a data migration varies. The main contributors are:

- The system you're leaving
- The amount of data you have
- The condition of your data
- Your responsiveness



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The migration process timeline is mainly affected by exporting data from your current system and your team's response time. Being responsive and having your data ready can make the process more efficient.

## 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 these four questions:

1. How easy is it to get my data back out?
2. Who is the owner of the data once it's in the system?
3. What costs are associated with retrieving my data?
4. 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?

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How do I get my data into the system?

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How clean does my data need to be?

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Does my file need to be in a certain format?

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File format: ☐ .CSV ☐ Excel ☐ Other: \_\_\_\_\_

Templates Available? ☐ Yes ☐ No

Can you create custom fields? ☐ Yes ☐ No



Can I import multiple policies for one client?

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

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Can you move multiple databases? ☐ Yes ☐ No

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

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Can they transfer? ☐ Yes ☐ No

Can they be exported? ☐ Yes ☐ No

Where are they stored? 

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## Data Migration Checklist

Is there a separate fee for data migration?

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Estimated fee? \$\_\_\_\_\_

How long will the migration take?

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Estimated time? \_\_\_\_\_

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

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

