

3 Steps to Manage the Change to a New Agency Management System

1 Appoint Department “Experts”

Divvy up responsibility by appointing department experts. Consider appointing your “experts” in the following departments:



Sales



Commissions



Leadership

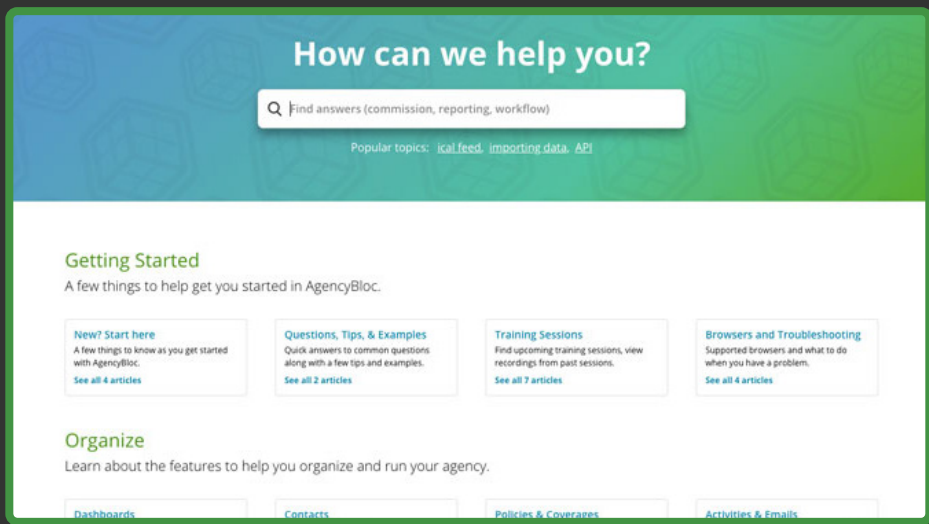


Account Management



Customer Service

2 Schedule Your Trainings



Leverage the tools your AMS provides you like:

- A help section
- Pre-recorded generic videos and trainings
- Step-by-step articles for different features
- Previous product release notes
- Live chat, phone, and email support
- Scheduled 1-on-1 trainings specific to your agency’s needs

“100% of the reason why we went with AgencyBloc was the customer service. They promised us that they’d be there to assist us in transitioning and training, and they delivered!”

Sandy R., Parks Insurance, Inc.

3 Set Up Your Future Game Plan

Learning a new software and setting up your new processes takes time. At AgencyBloc, we find 8 weeks to be the “sweet spot” for most clients to be fully up and running.

To put the best plan together for your team, start by attending your initial software training. After that, consider these steps:



Create an initial onboarding & training plan



Share your plan with your whole agency



Create feedback & support channels for your staff



Reevaluate your plan after 1 month



Adjust the plan as needed



Repeat