

BINDHQ

Agency Management System

DEMO CHECKLIST

BUYERS KIT

Getting the most out of your Agency Management System demo



AMS demos – whether onsite or online - vary from vendor to vendor, and even from salesperson to salesperson. That’s why it’s important to ensure you get the information you need from the demo, not just what the vendor (or salesperson) wants to show you.

Every firm is different in their starting point and in their immediate/ long term objectives for their underwriting and program management - a good rule of thumb is to make sure the vendor knows your priorities and key areas of focus a few days ahead of the demo.

Regardless of the route you choose to take, make sure the demo makes you feel confident about the following critical areas of research management:

1. The system is flexible and can be easily configured to the specific needs and processes of my firm, and the workflows of our underwriters and support team.	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. I will have all the functionality I need to get started now, but still have opportunity for growth and further advancements in the future.	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. The underwriting team will be comfortable adopting this system, and the steepness of the learning curve is one we will all be comfortable with.	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. I saw how to create and capture information on Insureds and the nature of the exposure from scratch (rather than only seeing a pre-built demo) and feel confident that underwriters would find it easy to do.	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. The system will provide my team with the access controls and enterprise security levels we need.	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. I was shown how the AMS dealt with key compliance regulations for record keeping and data management, and was either offered (or had) a demo targeted specifically for my compliance team to ensure they are confident in the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. The system will provide me with increased visibility and control into my firm’s sales performance, underwriting performance, program performance and general activity.	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. I was walked through the product roadmap, and am confident the future progression of the system will continue to advance at a pace that will benefit my firm.	<input type="checkbox"/> Yes <input type="checkbox"/> No