AGENCY MANAGEMENT SYSTEMS

The AMS Migration Readiness Checklist

32 things to settle before you sign the conversion contract

Most AMS conversions go sideways for reasons that had nothing to do with the new system. The data was messier than anyone admitted. Nobody owned the project. The go-live date landed on top of a renewal peak.

This checklist covers what to sort out before conversion work starts. Work through it with your team. Anything you can't answer is a risk item.

1. Data condition (do this first)

Your vendor converts what you give them. Bad data in the old system becomes bad data in the new one, usually with less context attached.

- ❑ Run a duplicate client report and record the count before you request conversion quotes.
- ❑ Check client naming conventions. "ABC Trucking," "ABC Trucking Inc.," and "A.B.C. Trucking" are three clients to a conversion script.
- ❑ Identify active clients with no policies and decide whether to delete them before conversion.
- ❑ Review your custom fields, including who uses each one and what it holds, then find out how or whether each one converts in the new system.
- ❑ Decide how far back your data needs to go. Vendors price by year beyond a baseline.
- ❑ Review open suspense and activity items. They convert as they are, so anything still open at cutover comes with you.
- ❑ Check policy personnel on each policy for the correct producer and servicing team.
- ❑ Identify inactive or terminated staff still attached to live records.
- ❑ Review your carrier and company codes for duplicates and dead entries.

2. Download and carrier connections

- ❑ Note your IVANS account details and who administers them.
- ❑ Run a report of every carrier you currently download from.
- ❑ Confirm which downloads need to be re-established in the new system.
- ❑ Decide how you'll handle downloads that arrive during the cutover window.

3. Reporting

- ❑ List the reports your team runs and reads on a regular basis.
- ❑ Name the owner of each report and what decision it drives.
- ❑ Confirm each one can be rebuilt in the new system, and by whom.
- ❑ Export and archive historical reports you'll want to compare against later.

4. Workflow and configuration

- ❑ Document your current workflows before you touch the new system. Undocumented process gets lost.
- ❑ Decide which workflows you're keeping and which ones existed only because the old system forced them.
- ❑ Set your security groups and permission structure deliberately, reviewing each role rather than copying the old configuration forward.
- ❑ Build your activity and task templates.
- ❑ Standardize your document naming and filing structure.

5. Project ownership and timing

- ❑ Name one internal project wrangler.
- ❑ Confirm that person has the available hours, and adjust their other responsibilities if they don't.
- ❑ Check your go-live date against your renewal peaks. Agencies with heavy January 1 or July 1 concentrations should avoid the months leading into them.
- ❑ Check your go-live date against month-end close and year-end.
- ❑ Confirm your read-only access period to the legacy system and get it in writing. 12 months is a reasonable target, and 6 months is usually too short.

- ❑ Budget for the legacy system license during the parallel period.
- ❑ Plan the training schedule by role, not by system module.
- ❑ Identify who on your team will be slow to adopt, and plan for that specifically.
- ❑ Decide what happens to work in progress at cutover.
- ❑ Set a date to review adoption 90 days after go-live.

What usually goes wrong

Data cleanup gets deferred. Agencies plan to clean up after the conversion. It doesn't happen, and the new system inherits the same problems plus a new interface.

Nobody owns it. The conversion becomes everyone's side project. Decisions wait. Timelines slip.

Training is scheduled once. People learn a new system over months, not during one week of sessions before go-live.

Where Linchpin comes in

We handle AMS work for independent agencies every day. Applied Epic, AMS360, EZLynx, and others. We're a Vertafore Orange Partner and an Applied Preferred Consultant Partner, and our accounting team runs agency books inside these systems, so we see what converts cleanly and what doesn't.

If you're evaluating a move, or you're mid-conversion and something feels off, we'll look at it with you.

Book a 30-minute assessment call: here.

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