



Top 25 Questions To Ask Before Purchasing a New CRM

The decision to purchase one agency management system over another will have a significant lasting financial impact on your insurance broker business. It is important to take the time required to fully understand and evaluate the different available options.

[But how? and where do you even begin?](#)

To help you, [we have created the following set of 'mad libs' styled questions for you to ask of any vendor before purchasing a new new CRM.](#)

It is amazing when you consider the impact that the answer to each of these will have on your business over time.



If you were to ask us these same questions about BenefitsGuide, the answer to all of them is a resounding YES!

Basic Functionality

1. Does _____ run on the [Salesforce Platform, the worlds #1 CRM](#), or not? If not, then please tell me why I will be happier with something inferior? I am asking because not all “clouds” are created equal and you are telling me that _____ is built in a sort of stand alone cloud without all the synergy that comes from being built on a Platform.
2. Is _____ infinitely customizable? Will we be able to add new fields, change page layouts, build reports and dashboards, change or build new workflows? If _____ is not infinitely customizable, please tell me how it will continue to satisfy our needs as they change over time.
3. Can users of _____ [choose from over 3000 third party applications in the worlds #1 business application marketplace, the Salesforce AppExchange](#), to help them solve for any business requirement? If not, will we have access to the world #2 business application marketplace?
4. Do users have the ability to create custom reports and dashboards?



5. Will _____ allow us to track different kinds of Contacts and Accounts? i.e. Prospects or Clients vs Carriers, other Brokers and Vendors? If not, then please tell me how we should manage our carrier contacts, vendors and others.
6. Have there been any [new features](#) or enhancements made to _____ in the last year? If so, please tell me what new features were added. If not, then please tell me what are your plans to update _____ in the future.

Mobile Access

7. Will _____ give us [access to all of our information on our mobile devices](#)? If not, please tell us why we will be happier only having access my information through our PC.
8. Will _____ give us [access to all the functionality on our mobile devices](#)? If not, please tell me why I will be happier only being capable of using those tools from a PC.
9. Will _____ also capture emails sent from my mobile device? If not, please tell me why I will be happier having everybody's emails separate from the notes in our CRM.
10. Will _____ sync my emails and calendar events from Outlook or Gmail? If not, please tell me why I will be happier having everybody's emails separate from the notes in our CRM

Insurance Specific Functionality

11. Does _____ [eliminate redundant data entry](#)?
12. Does it create [beautiful branded client distribution ready Benefit Booklets](#)?
13. Does _____ have [integrations with other best of breed insurance technology applications](#)? Does it sync with [BerniePortal](#), [CommissionsDept](#), [Code SixFour](#), [Zywave Broker Briefcase](#), or any others?
14. Does _____ allow you to track over 40 different lines of coverage from Medical, Dental, Vision, all the way down to Travel Insurance and Pet Insurance? If not, then where will we track the information that we need to manage these ancillary products that we sell?
15. Does _____ have the ability to manage both fully and self insured plans? If not, then where will we track the information about these ancillary products that we sell?



16. Does _____ have the ability to track Member Transactions like Enrollments, Terminations, and Changes? If so, are follow up tasks automatically created and assigned? [Will emails be automatically sent by the system to communicate information to the member and group benefits administrator about plan benefits, forms needed for administration, hints on how to search the provider network, information about value added services, and more?](#) if so, can this be done in bulk for multiple members at once?

Workflow Automation and Implementation

17. Does _____ have the ability to [automate the creation of tasks based on rules set up during your implementation for all the typical insurance broker processes](#)? If not, then how will new our employees know what to do next? If not, then do you have a better system for managing this work? How can we make sure that nothing will fall through the cracks?
18. Will we get to [work with a team of experienced Business Analysts](#) to document the tasks performed in our office as part of the typical insurance broker processes? If not, then will need to figure this out on our own?
19. Will you [custom build the workflows that are designed for our business](#) so that it specifically satisfies our business requirements, using our jargon and business rules built entirely on the Salesforce Platform? If not, then for whose business will they be designed ?
20. Do you have [a methodology for defining the steps in the workflows](#) so that we are not starting from scratch? If not, then can you tell me if you have done this before.

Training and Support

21. Is there ongoing support and training available? Is there live training, a library of videos, or / and written documentation?
22. Is there a different training curriculum designed specifically for Management vs Users? If not, then how will we know how to manage our employees using _____?

BONUS QUESTIONS

23. Does _____ have [a ticket based call center application](#) built in? Can you [manage incoming emails as tickets](#)? If not, then how will we [measure the performance of our client service team](#)?



24. What kind of tools are built in to help reduce the time spent managing user adoption? Is there an [AI robot named George that can monitor your sales and client service teams?](#)
25. Does _____ allow you to import selected leads from a national database of all the businesses who have recently filed a Form 5500? If not, then how will _____ help us to find new prospects?