

## BYTES & BITS

In my travels around the country speaking and consulting, I get to see a wide range of automation implementation levels within agencies. I've worked with hundreds of agencies including the smallest agency with little or no automation to the largest entities with technology everywhere. In a series of articles this year, we are going to cover many of the various aspects of technology that today's agencies have available to them, as well as the agency "attitude" that is required to implement the technology to achieve a desired result.

If you look at automation in most of the agencies around the country, you see a hodge-podge of mostly unrelated technology that has been thrown together without any real "master plan." One to three person agencies – DON'T TURN ME OFF AT THIS POINT!! The words planning, results and technology all relate to you just as much as the 200-person agency. Maybe more – you don't have any room to make a mistake. You better get it right the first time or, if you have made some mistakes, quickly fix them. Agency owners can tell you why they represent the carriers they represent, why they have the employees they have, why they have the customers they have, why they are in the location they are and why their profits are up or down. But few can tell you why they have the technology in their office that they do, how they are using it, why they are using it the way they are, what potential exists with that technology and how it all relates.

I find agency principals, for the most part, very much in control of their business with the one exception – technology. They almost all readily admit that they know nothing about it and don't want to know anything about it. They would never admit that they do not know how to manage their agency. But

bring up technology – and their hands go in the air in a sign of despair. I found this helplessness rise to a new level once the Internet began to make its presence known. Until then, some agency principals at least put up a struggle to grasp what was going on in their agency with technology. Once we went from technology just being about your local office network to connecting to a whole world of technology, principals pretty much threw in the towel. I began to see that glazed look in their eyes for the first time. So, if you feel that way, you are not alone. And if you think you have it all figured out – call me. I could use the help consulting.

So, with that picture painted, we at PIA have created a series of articles that will help you at least have a basic understanding of various technology features. These will include:

- Transactional Filing
- Imaging
- Choosing a management system
- Training
- Utilizing your system
- Monitoring and auditing your technology
- Procedures
- How to work with your local technician
- Application Service Providers (ASP)

These articles will contain information that you need to make good decisions, listing the pros and cons of various aspects of the topic at hand. They will also contain things to never do under any circumstance and things to always do. This will be information, not out of a book, but borne from "in the trenches" experience.

Check back next month, and take the journey with us.

### About the Author

For the last 10 years, Mark has been providing agents with expertise in automating and managing their offices. Mark began his career in the insurance industry serving in various positions in the agency business, including producer, CSR, claims, marketing, accounting, management, computer management, operations management and owner. Mark has also had experience with mergers and acquisitions, specifically the financial, operational and automation structure for these.

Most noted for his automation abilities and knowledge, Mark has been involved in helping agents and working with automation user groups for a number of years. Over the last five years, he has been encouraging the industry to move toward centralized automation, now known as ASP. Mark is president of Ajasent, Inc., an Internet accessible data center dedicated to hosting of insurance industry software.

In addition to being published in several industry journals, Mark is a contributing editor for The Automated Agency Report (TAAR), a leading authoritative about agency automation. He is also a member of the TAAR Network - a one-stop educational and information resource positioned to offer you the help needed to make your agency work better. More than any other consultant in America, Mark understands the inner workings and product of the major vendors. He is in the unique position of being able to help your agency select a system that truly fits your needs. His highly sought after Agency Automation Audit lets an agency know where they stand in the automation arena and how to get to where they need to be.

Mark is available for individual consulting assignments, publishing and speaking.