



The MGA systems readiness checklist

A working checklist for founders and COOs: map your stack, spot the costliest frictions, and decide whether modernization is worth it — before you talk to any vendor, including us.

1 Inventory your stack

- ☐ **List every system** — AMS, rater, carrier portals, the spreadsheets that act like systems, and the email workflows that hold them together.
- ☐ **Name the owner of each** — who maintains it, who actually understands it.
- ☐ **Trace the feeds** — what data enters each system, from where, typed by whom.
- ☐ **Run the vacation test** — what breaks if each owner is out for two weeks?

2 Spot the friction signals

- ☐ **Re-keying** — the same submission typed into more than one system.
- ☐ **Month-end assembly** — carrier or management reports built by hand from exports.
- ☐ **Quotes that wait on a person** — producers queueing for someone to be free.
- ☐ **Renewal-season overtime** — extra hours just to stand still.
- ☐ **The one file** — a spreadsheet only one person understands.

3 Check your trigger

- ☐ **A carrier or fronting partner** is demanding more data on tighter schedules.
- ☐ **A program launch** has a real date on the calendar.
- ☐ **Producers are drifting** to competitors who quote faster.
- ☐ **An error reached a carrier** — and the post-mortem pointed at the process, not a person.

If none of these is live, modernization can probably wait. That's a fine answer — revisit this page next quarter.

4 Readiness questions

- ☐ **Decision authority** — can the founder or COO make this call without a committee?
- ☐ **Team capacity** — can the people who know the workflows give 3–5 focused hours a week?
- ☐ **Budget authority** — is there sign-off room for a fixed-fee first phase?
- ☐ **First fix** — do you know what you'd fix first? If not, that's exactly what a systems assessment is for.

Next step, if the boxes are ticking: a free 60–90 minute workflow mapping session. We whiteboard your flow, put numbers on the three costliest frictions, and send you the one-page map the same day. newtecinsurance.com/contact/ · contact@newtecinsurance.com

