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EVALUATION GUIDE

The Benefits Broker's CRM & Agency Management Evaluation Checklist

Twelve questions to ask before you commit to a new system.

Every CRM or agency management platform will promise to solve problems and make work easier. The real test comes after the demo, when your producers, account managers, service teams, and leadership are relying on it every day.

Use these twelve questions to look past the polished demo and understand how a system will actually support your agency's sales process, client service, renewals, commissions, integrations, reporting, workflows, and day-to-day operations.

Bring the checklist into vendor conversations. Ask for specific answers. Ask to see the workflow. And pay attention when something that sounds standard quickly turns into a future custom project.

What a strong answer sounds like. Specific. Demonstrable. Clear about what is standard, what is configurable, what requires development, who owns the work, and what it will cost.

This checklist is intentionally vendor-neutral. Use it with BenefitsBridge or any other platform under consideration.

THE TWELVE QUESTIONS

For each answer, mark where it falls on the scale — standard today, configured for your agency, or a custom build.

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01. Vendor and product stability

How long has the product been in the market, who is behind it, and who owns the roadmap?

What to listen for. A clear product history, accountable ownership, and confidence that the vendor is investing in the platform for the long term.

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02. Integration ownership

If a tool we use does not connect natively — phone system, web forms, enrollment tools, or other software — who scopes and owns the integration work?

What to listen for. A practical integration approach, clear ownership, and transparency about what is configuration versus development.

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03. Lead capture

Can leads from our website or marketing forms flow into the system automatically, without manual re- entry?

What to listen for. Ask the vendor to show where the lead lands, what happens next, and how duplicates or incomplete submissions are handled.

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04. Sales pipeline visibility

What does tracking a lead from first inquiry through a closed opportunity actually look like?

What to listen for. Producers should get a simple process while leadership gets useful visibility into stages, next steps, pipeline value, and activity.

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05. Communication tracking

Can emails from Outlook or our existing email system be tracked to the right client, contact, or policy record without manual re-entry?

What to listen for. A shared relationship history that does not force users to abandon the email tools they already use.

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06. Document control

If we connect SharePoint or another file-storage system, do we control which folders and documents are surfaced to users?

What to listen for. Ask who controls permissions, folder structure, and what users actually see inside the CRM.

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07. Client collaboration

Can clients securely access, review, or edit shared documents, and how are changes and follow-up handled?

What to listen for. Whether collaboration happens against the same controlled document, or creates disconnected copies and manual follow-up.

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08. Reporting on demand

Can we pull the reports we actually need — commissions, renewals, pipeline, and activity — without always waiting for someone else to build them?

What to listen for. Self-service views, dashboards, exports, and reporting options, along with clarity on when a custom report is truly required.

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09. Workflow consistency

Can the agency standardize shared workflows and templates while still controlling who can change them?

What to listen for. The system should create consistency without letting every user rewrite a core agency process.

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10. Plan and rate flexibility

Can the system handle the rate structures and tier setups our carriers actually use, not just a standard model?

What to listen for. Ask for a real example that resembles your book of business. Avoid assuming a generic benefits data model will fit every carrier or plan.

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11. Configuration and customization

Can we add fields, adjust views, and tailor the system to match how our agency works? What is configuration versus custom development?

What to listen for. A flexible system should accommodate common agency differences without turning every change into a development project.

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12. Pricing transparency

If we need something beyond standard configuration, will the scope, ownership, and cost be clear before work begins?

What to listen for. A vendor that is comfortable distinguishing included capabilities from paid development before you commit.

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READING THE ANSWERS

Do not settle for a yes-or-no answer

Many CRM and agency management platforms can answer a feature question with "yes." The more useful follow-up is: show me how.

Ask the vendor to walk through the workflow using a scenario that resembles your agency. Ask what is available out of the box, what can be configured, what requires development, and who owns the work after implementation. Those details often matter more than the feature list itself.

If you come away with clear, specific answers about how the system will support renewals, commissions, integrations, reporting, and day-to-day agency work, that is a good sign. If the answers stay vague, or everything becomes a future custom project, take that seriously too.

> **A Microsoft-powered platform underneath.** The technology underneath the application determines how easily it connects to the tools your team already uses, and how well it can evolve over time. BenefitsBridge is built on the Microsoft Power Platform and works with familiar Microsoft 365 tools, giving benefits agencies a connected foundation for CRM, agency management, automation, reporting, documents, and future innovation.

WHY BENEFITSBRIDGE

Built to stand up to these questions

BenefitsBridge is CRM and agency management software built specifically for employee benefits brokers on the Microsoft Power Platform. It brings client and policy information, sales, renewals, commissions, workflows, documents, reporting, and Microsoft 365 collaboration together in one connected system — with the flexibility to adapt to the way an agency actually works.

Use this checklist with BenefitsBridge or any other platform you are considering. The goal is not to give every vendor the same score. It is to make sure your team knows what it is actually buying before the decision is made.

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