Agency Management System Migration Checklist

Plan a move to a new AMS: what to export, how to map it, what to test, and how to cut over without losing client data.

WHO USES IT	Agency Owner, Manager, Admin
LINES	Not line-specific
VERSION	1.0	Last reviewed November 19, 2026
MAINTAINED BY	AgencyPacket
ONLINE	https://agencypacket.com/resources/agency-management-system-migration-checklist

BEFORE YOU USE THIS
Review this against your agency's current processes, carrier guidelines, and E&O requirements before you put it into practice. Insurance rules vary by state, and some requirements are set at the local level, so confirm the licensing, disclosure, filing, and recordkeeping rules that apply where you operate. This resource is general guidance, not legal, compliance, or insurance advice. See our Terms at https://agencypacket.com/terms. Many states have insurance data security and breach notification rules. Check the ones that apply to you.

Purpose

Moving AMS systems is one of the largest operational projects an agency does. Data gets lost, notes don't carry over, attachments break, and staff lose weeks to confusion. Most of that is avoidable with a plan made before anyone signs a contract.

When to use it

Use it when you are considering, selecting, or about to start a move to a new AMS, or to change how your agency stores client, policy, and document data.

Process owner

The agency owner owns the decision. A named project lead (usually the operations manager) owns the plan and schedule. Each department names someone to test their own work.

Before you begin: required information

- A list of your current system's modules and who uses them
- Number of clients, policies, documents, and years of history
- Current contract end date and notice requirements
- Budget and target timeline

- Your list of must-have features

Procedure

Migration goals

- [ ] Write down why you are moving: cost, features, service, integrations, carrier download, or something else.
- [ ] Define what success looks like in measurable terms, such as "all active policies and 5 years of notes available on day one".
- [ ] Set a target date and a latest acceptable date.
- [ ] Name the project lead.

Vendor evaluation

- [ ] Write a requirements list: carrier download, rater integration, document handling, reporting, mobile, e-sign, accounting, user permissions.
- [ ] Ask each vendor for a demo using your own scenarios.
- [ ] Ask for references from agencies of your size and lines of business. Call them.
- [ ] Ask each vendor how they handle conversions: what data comes over, what does not, who does the work, and how long it takes.
- [ ] Read the contract for data ownership, export rights, fees, term, renewal, and termination.

Existing data inventory

- [ ] List every data type: clients, contacts, policies, coverages, vehicles, locations, producers, notes, activities, documents, certificates, claims, accounting, commissions.
- [ ] Note where each lives, including systems outside the AMS: spreadsheets, shared drives, email.
- [ ] Decide how much history you will carry over and what you will archive.

Data ownership and export

- [ ] Confirm in writing that the agency owns its data and can export it.
- [ ] Request a full export from your current vendor, including attachments, in a usable format. Ask about fees and timing.
- [ ] Keep a complete backup of the old system's data in a secure place before conversion starts.
- [ ] Find out how long you keep access to the old system after cutover.

Field mapping and cleanup

- [ ] Build a map from each old field to a new field. List fields with no home.
- [ ] Decide how to handle custom fields, codes, and statuses.
- [ ] Clean duplicates, inactive accounts, bad addresses, and incomplete records before you convert, not after.
- [ ] Check producer and CSR codes, carrier codes, and line-of-business codes.

Attachments, documents, and history

- [ ] Confirm what happens to documents: folder structure, links, and file names.
- [ ] Confirm how notes and activities are converted, and whether dates and authors are preserved.
- [ ] Decide how you will keep certificates, binders, and signed documents findable.

- [ ] Check storage limits and retention rules.

Integrations and permissions

- [ ] List every integration: carrier download, comparative rater, e-sign, phone system, email, texting, accounting, website forms, and CRM.
- [ ] Confirm each works with the new system, and who sets it up.
- [ ] Plan user roles and permissions. Give each person only the access they need.
- [ ] Plan multi-factor authentication and individual logins for every user.

Security

- [ ] Ask each vendor about encryption, access controls, backups, and incident handling.
- [ ] Ask for security documentation or an independent report. Review it.
- [ ] Confirm where data is stored and who can access it.
- [ ] Check the vendor contract for breach notification.

Test migration and training

- [ ] Run at least one test conversion with real data.
- [ ] Have each department check a defined sample: clients, policies, notes, documents.
- [ ] Write down every error, fix, and rerun.
- [ ] Build a training plan. Train in groups by role with real scenarios.
- [ ] Give staff time to practice before cutover.

Cutover and rollback planning

- [ ] Choose a cutover date that avoids peak renewal weeks and month-end.
- [ ] Plan a freeze: no changes to the old system after a set date and time.
- [ ] Write a rollback plan: when you would use it, who decides, and how you would restore.
- [ ] Tell clients and carriers about any changes that affect them, such as new contact details or portals.

Post-migration validation

- [ ] Spot-check a sample of active clients, policies, and documents against the old system.
- [ ] Check counts: clients, policies, documents, and open tasks.
- [ ] Confirm carrier downloads, integrations, and reports work.
- [ ] Collect staff issues daily in the first two weeks and fix them in order.
- [ ] Keep the old system accessible until you have confirmed everything you need.

Execution checklist

- [ ] Goals and success measures written
- [ ] Vendors evaluated and references called
- [ ] Data inventory complete
- [ ] Data ownership and export confirmed in writing
- [ ] Field mapping and cleanup done
- [ ] Documents, notes, and history plan agreed

- [ ] Integrations and permissions planned
- [ ] Security review done
- [ ] Test migration checked and fixed
- [ ] Staff trained
- [ ] Cutover and rollback plans written
- [ ] Post-migration validation completed

Exceptions and escalation

- **Vendor cannot move something you need.** Decide whether to rebuild it, archive it, or choose another vendor before signing.
- **Test migration shows serious errors.** Don't cut over. Fix and retest.
- **Staff are not ready.** Delay the cutover. Don't go live with an untrained team.
- **Data you need is only in the old system.** Export it before the old contract ends.

Completion criteria

- The new system has been validated against the old.
- All integrations and carrier downloads work.
- Staff are trained and using the system.
- You have a complete archive of the old data, stored securely.
- The old system is turned off only after you confirm nothing is missing.

Make it yours: agency customization

This is a starting point built for independent agencies in general. Fill in the details below so it matches how your agency actually works, then keep your version with your other procedures.

Project lead and department testers
Names.

Our must-have list
Features and integrations.

How much history we will convert
Years.

Target cutover date
Date, avoiding peak weeks.

Rollback decision maker
Name.

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