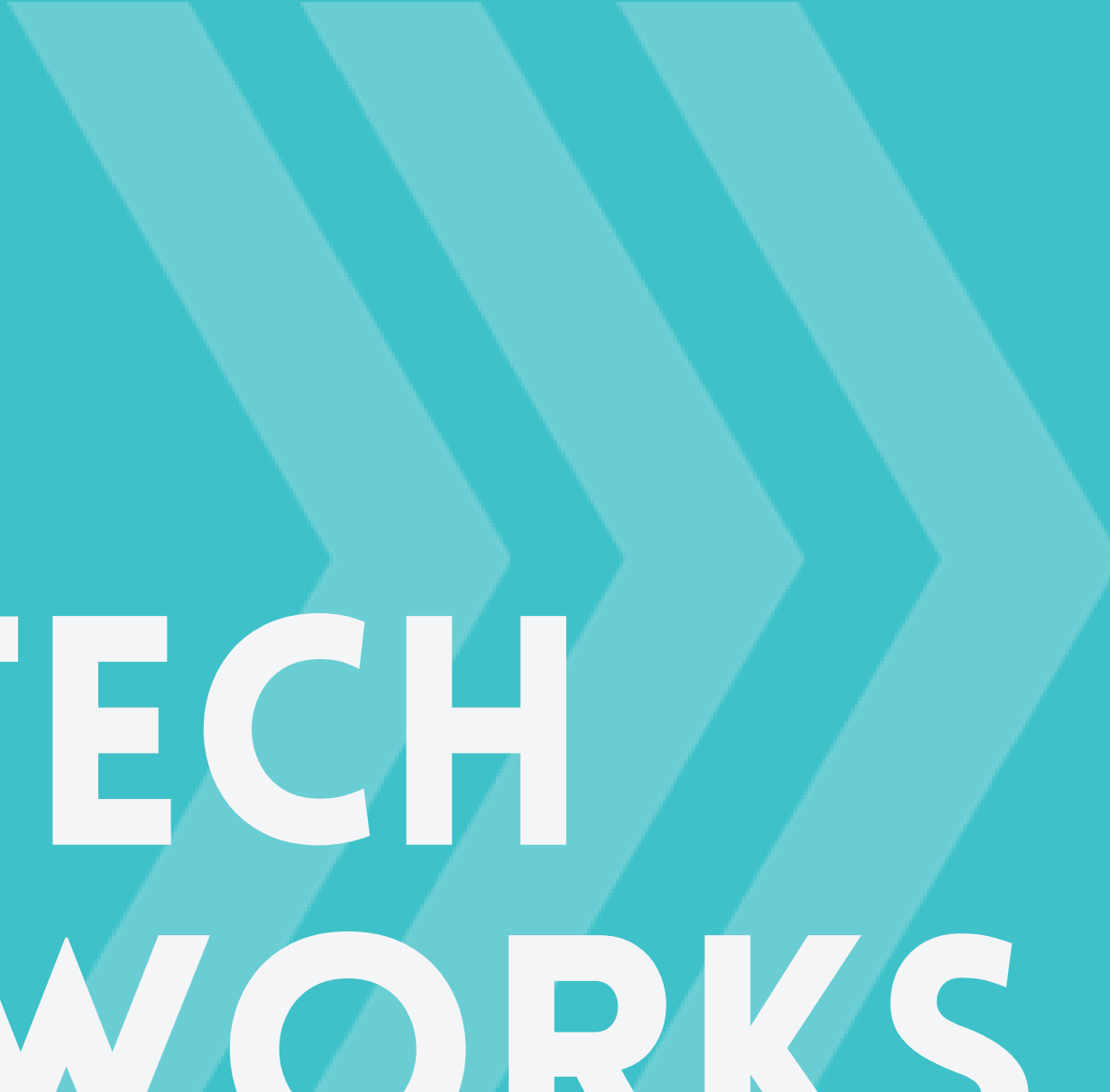


AGENCY OPS  
ADVANTAGE 

Big I of Illinois  
CONVO  
October 2026

# BUILDING A TECH STACK THAT WORKS FOR YOUR AGENCY



# TODAY'S OBJECTIVES

Build a strategic tech stack that works for you & earns its keep

01

**DECIDE**  
with  
intention

02

**IMPLEMENT**  
smart  
solutions

03

**GOVERN**  
for  
results



# HELLO! I'M JESSICA YARBROUGH

- COO & Co-Owner, Johnson Insurance
- Founder, Agency Ops Advantage, LLC
- Wife to Chad
- Mom to Carter and Libby



# AGENDA

Here's what we're in for today

## Part 1

**Designing a  
Strategic  
Tech Stack**

## Part 2

**InsurTech  
Perspectives:  
Panel Discussion**

## Part 3

**Turning Ideas  
into Action:  
Takeaways**

## Building Your Agency's Technology Stack Check In

Scan the QR code for IL CE  
credit.

If you need assistance, see a Big I Illinois  
volunteer near the doors now  
(not at the end).

WiFi is: MarriottBonvoy\_Conference Password: WRB





# TECHNOLOGY AS AN OPERATIONAL STRATEGY

# DECORATING IS NOT DESIGNING

Don't confuse  
“buying stuff” with  
being strategic



# TYPICAL TECH STACK



# STRATEGIC TECH STACK



- Disconnected
- Underutilized
- Redundant
- Expensive
- Rogue



- Meaningful
- Efficient
- Fully Utilized
- Defined ROI

**WHY DOES TECHNOLOGY MATTER  
IN YOUR AGENCY?**

**WHY DO YOU EVEN HAVE A  
TECH STACK ANYWAY?**

# TECH STRATEGY

**We believe technology is here to:** \_\_\_\_\_

**We use it to:** \_\_\_\_\_

# TECH STRATEGY

## Examples

We believe technology is here to  
**support human flourishing.**

We use it to help our team get **more done faster** so they can work fewer hours and have more time to enjoy life.

We believe technology is here to  
help us **do more with less.**

We use it to **scale our team** without increasing our headcount and payroll.

We believe technology is here to help us conduct business using the  
**fewest number of employees** as possible.

We use technology to **automate as much as we can**  
to **increase profits & prepare** for the marketplace of the future.

# YOUR TURN

Jot down your first draft of a tech strategy statement

**I believe technology is here to:** \_\_\_\_\_

**I use it to:** \_\_\_\_\_



# ASSESSING WORKFLOWS AND IDENTIFYING GAPS

**OBJECTIVE #1:**

**FIND THE PROBLEMS**

# SURVEY YOUR TEAM

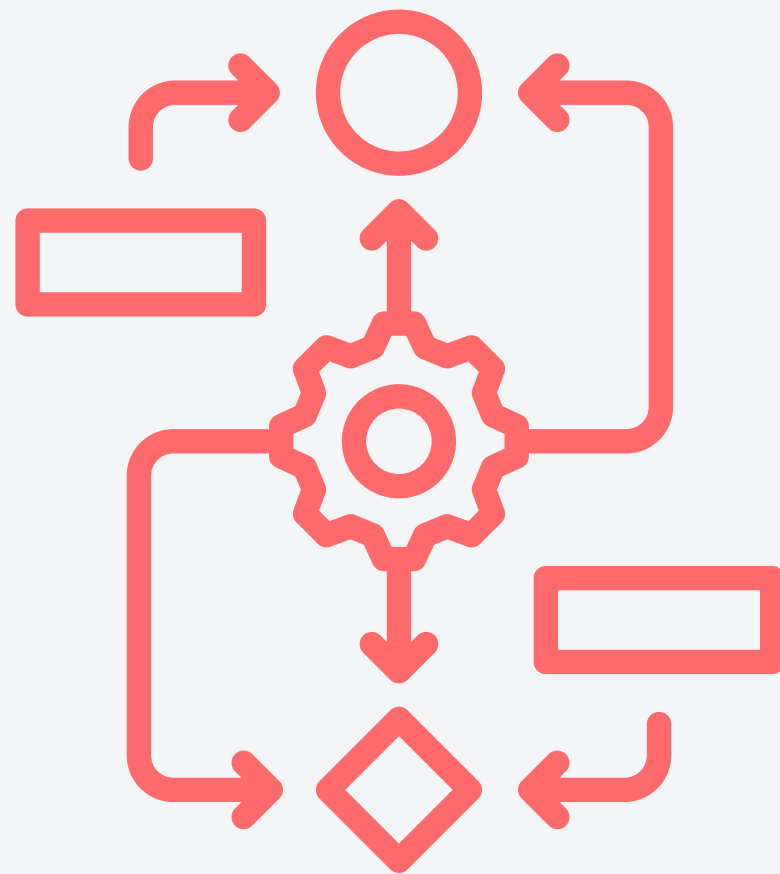
You don't know if you don't ask

## Find out:

- What's your **favorite part** of your job?
- What do you wish you had **more time** to do?
- What's the **most frustrating** part of your job?
- What part of your work currently feels **cumbersome** or like it requires **too many clicks** to complete?
- What tasks make you feel a **sense of dread** when you realize you have to do them?

# PROCESS MAPPING

Find out what's actually being done



## Simple places to start:

- Handling paper mail
- Sending policy copies to clients
- Managing payments

*Always ask WHY*

**OBJECTIVE #2:**

**LOOK FOR SOLUTIONS YOU  
ALREADY HAVE**

# REVIEW YOUR SURVEY

What can you fix?

## Follow up:

- Identify **common pain points or trends** among responses
- Meet with respondents to **review findings & identify priorities**
- Look for opportunities to **reduce friction**
  - Adjust settings or permissions
  - Clean up hand-offs between people
- Sometimes there's **an easy fix** right under your nose!

# SEQUENCING MATTERS

Don't rush to automation





# **EVALUATING NEW TECH BEFORE PURCHASING**

**OBJECTIVE #3:**

**FIND YOUR RIGHT TECH SOLUTIONS**

# THE SCIENTIFIC METHOD FOR TECH ADOPTION



Stress-test before you commit.

---

## 01 Gather Facts

Identify real problems  
& opportunities

## 02 Form a Hypothesis

What should change &  
how will we measure?

## 03 Run the Experiment

Conduct effective  
testing

## 04 Analyze Results

Was your hypothesis  
correct? What did you  
decide?

## 05 Communicate Findings

Share your feedback  
and decision.  
Thank your testers.  
Update your workflows.  
Schedule training.

# HYPOTHESIZE FOR ROI

Identify a measurable desired outcome

## Hypothesis

We think that by using this tool, we will get this desired outcome:

---

We can measure this outcome by:

---

# DESIGN YOUR EXPERIMENT

Stress-test your hypothesis and make an informed decision

## Beta Testers

- 2-4 End Users
- At least one skeptic
- At least one champion

## Parameters

- “Use this tool to perform these specific actions this many times in so many weeks”
- Collect specific feedback & results

## Review & Decisions

- Set a follow-up meeting with beta testers to review feedback & results
- Will you keep, change, or stop using the tool?

***Tip: Be sure to share both positive & negative feedback with vendors!***

# MAKE A DECISION

Then make it official

## **After Purchasing:**

- Update workflows and procedures guides to include the new tool
- Schedule ongoing training
- Communicate clearly what your team needs to STOP doing as well as what they need to START doing
- Make sure all related teams or individuals know what's changed

# MANAGING YOUR TECH STACK



**OBJECTIVE #4:**

**OWN WHAT YOU BUY**

**IF NO ONE OWNS YOUR TECH STACK,  
YOUR TECH STACK OWNS YOU.**

# DATA IS KING

Your AMS is your system of record. How tidy is it?

## Clean

- Consistent naming conventions
- No duplicate records
- Standardized entry

## Complete

- Required fields filled in
- All client info in the AMS
- No missing contact info

## Owned

- A named person is accountable
- Regular data audits & cleanup

# IMPLEMENT AN AI USAGE POLICY

Make it a practical reference guide, not a legal contract

**How is AI to be used in our agency?**

**What tools are approved?**

**What are acceptable use cases?**

**Who is responsible for approving new tech?**

# CREATE AN APPROVED TOOLS LIST

What do we have and how is it used?

## Example:

- **Epic:** the system of record/source of truth. All client info must be here.
- **Outmarket:** AI tool for policy comparison, contract/COI review, proposal generation, claims review, etc. Used to speed up processing and review.
- **Indio:** accessed within Epic; primary tool for completing applications
- **ChatGPT:** only to be used with non-PII data for general needs, not clients

# HIRE & MANAGE YOUR TECH STACK

Start thinking of your tools like they're part of your team

## Hiring

- Every tool must have a **job description** before you onboard them
- What to pay for them? = How much **value** are they creating?

## Managing

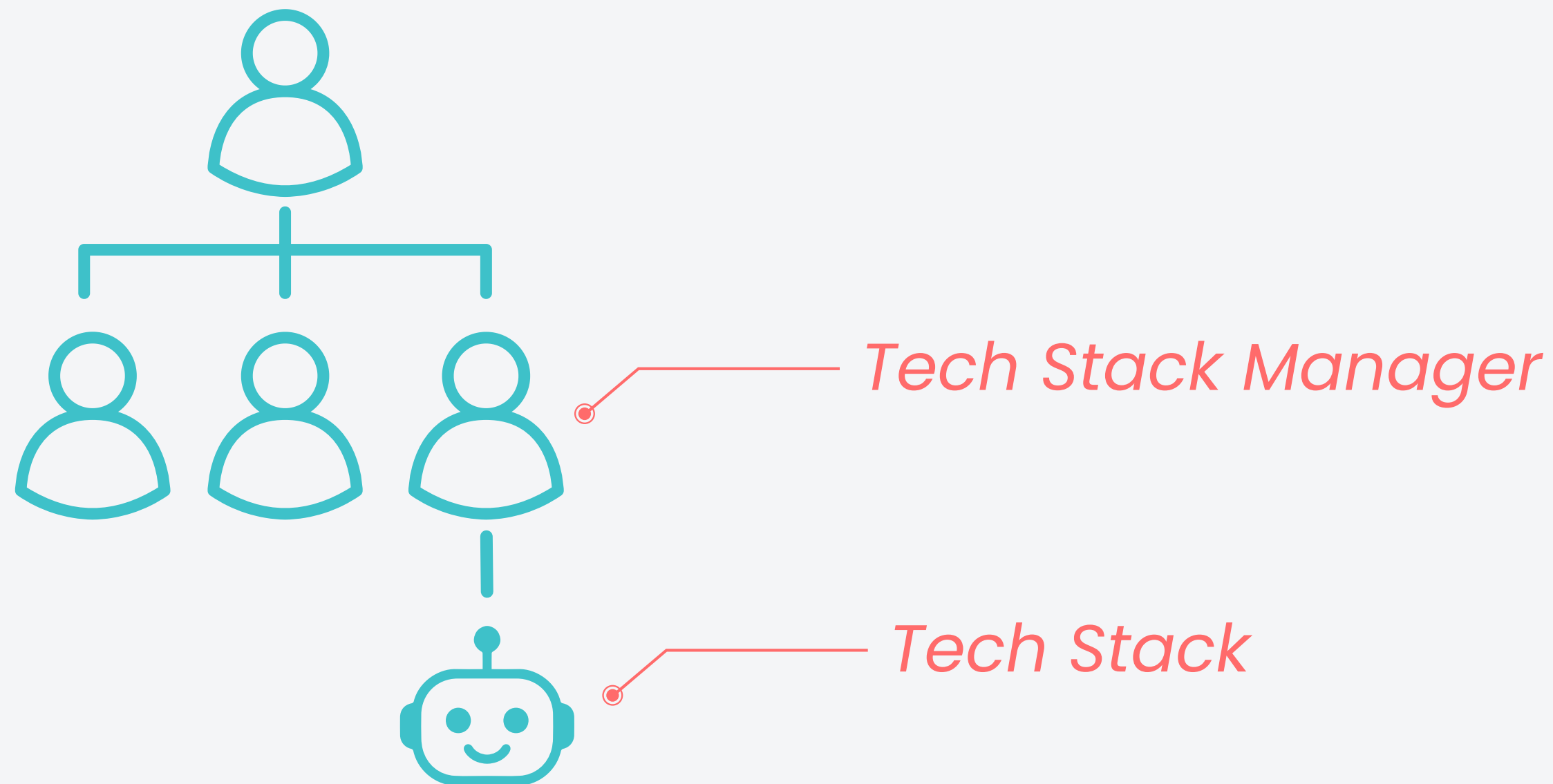
- Establish a **reporting structure**
- Regularly conduct **performance reviews**

## Promoting & Firing

- For tools that are performing well, how can you **get more out of them?**
- For those that aren't, **let them go!**

# UPDATE YOUR ORG CHART

No, really! Do it!



# APPOINT A TECH STACK MANAGER

It's probably not a full-time job, but someone has to own it

## TSM Responsibilities

- **Oversee** the agency's tech stack across all departments & roles; **ensure** AMS data is correct
- Assist with or be responsible for **vetting any new tech solutions** being considered
- Maintain and share a **list of approved tools**
- **Conduct quarterly tech stack audits**, AKA "performance reviews", and make recommendations accordingly
- Run periodic **staff surveys** to identify pain points, opportunities, and training needs
- **Conduct group and 1:1 trainings** with staff members on new and existing tech
- Occasionally **shadow team members** to observe workflows to find other areas for support or improvement

# AUDIT YOUR TECH STACK

Treat every tool like an employee: hire, manage, promote... or fire



## Keep

Performing well:  
Leave it alone.



## Promote

Underused:  
Invest in adoption.



## PIP

Unclear value:  
Performance  
Improvement Plan.



## Fire

Not producing:  
Cut it loose.

# PRIORITIZING AND ROADMAPPING



**START WHERE YOU ARE WITH  
WHAT YOU HAVE.**

**DECIDE WHERE YOU WANT TO GO  
AND FIND WHAT YOU NEED.**

**OBJECTIVE #5:**

**PLAN FOR WHAT'S NEXT**

# REMEMBER YOUR TEAM SURVEY?

What did your team say was a pain?

## Get Creative

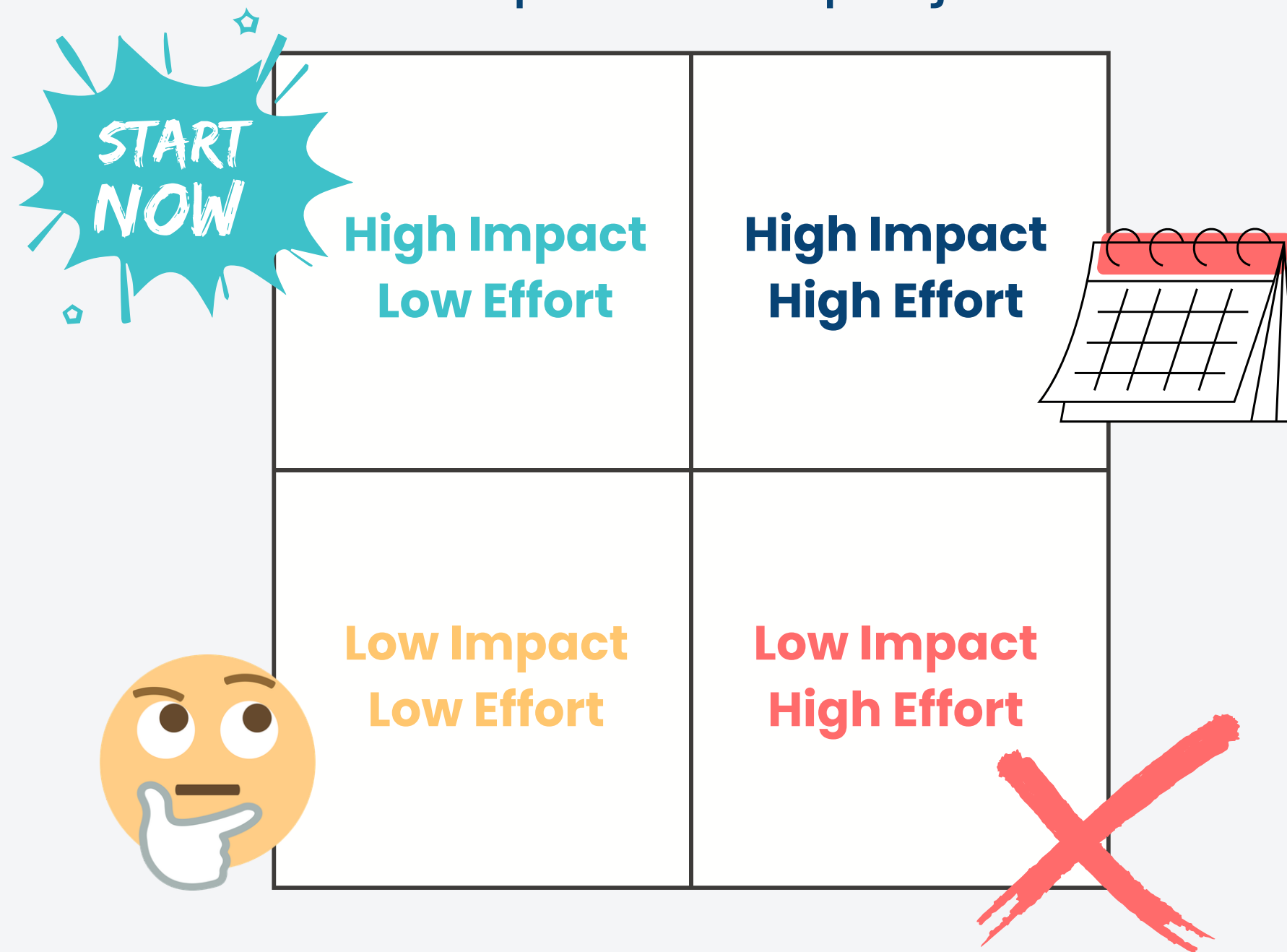
Make a list of all the things you COULD do to tackle the pain points and opportunities your survey revealed.

Which ideas would require purchasing new tech and which ones can use what you already have?

*Tip: Put each idea on a post it note!*

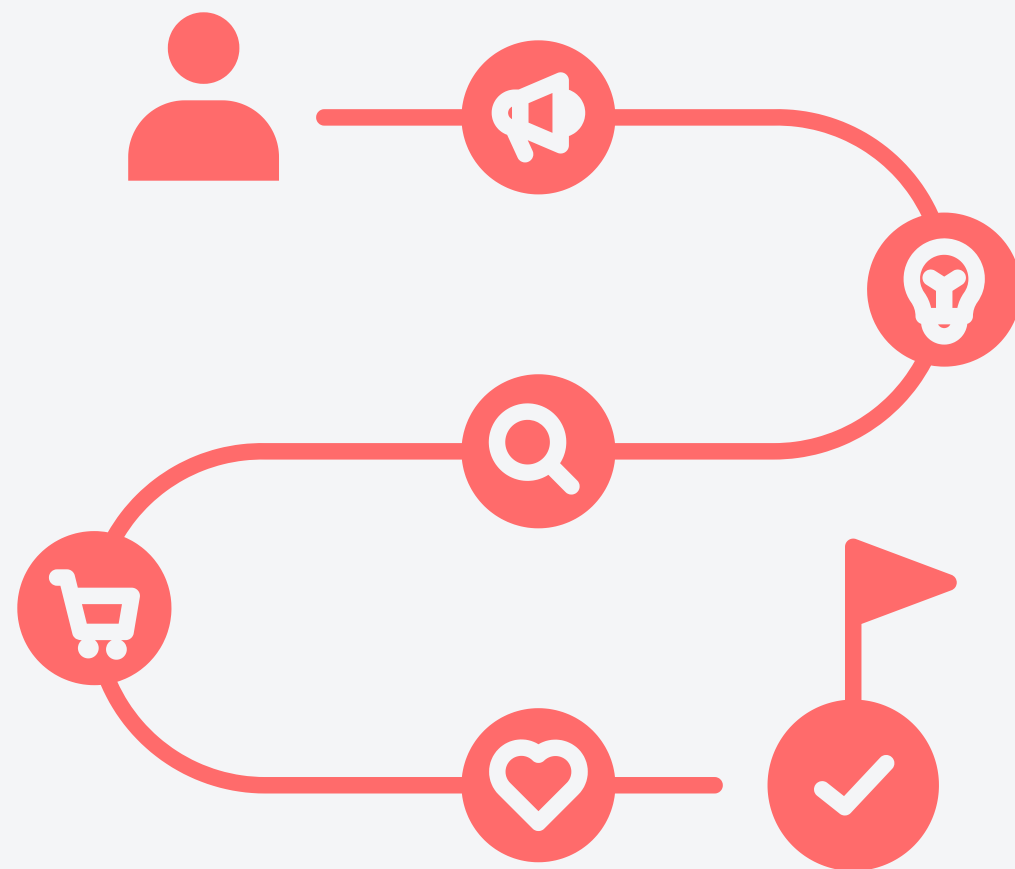
# IMPACT/EFFORT MATRIX

Prioritize potential projects



# YOUR TECH STACK ROADMAP

Start where you are and know where you're going



## Get From Here to There

1. Are you fully using what you already have and pay for?
2. What isn't currently being addressed with what you have?
3. Recall your tech strategy. What would you need to add or change to make that statement more true?
4. Start with quick wins and then invest in needle-movers.

# SEQUENCE YOUR ROADMAP



## Quick Wins

Uses what you  
already have

## Needle-Movers

Requires budget,  
time, development

## Possibilities

Nice-to-have's  
that can wait

# WORKING WITH VENDORS



# QUESTIONS FOR VENDORS

Think like you're interviewing for a new hire

## Examples

- How is data that we upload **used** and **protected**? Who else **has access** to what we share?
- How long have you been **SOC-2 compliant**?
- Will your product **integrate directly** with our AMS or will I need to **purchase add-ons or upgrades** to fully use it?
- What **visibility** do I have into how our staff is using this product?
- If pricing is usage-based, how can I **monitor our utilization** rate?

# BUILD A VENDOR SCORECARD

Compare options against the same criteria

## Functionality

Does it **solve the problem** we defined?

## Usability

Will this tool **integrate** easily into existing workflows or make them **simpler**?

## Implementation

How much work is **actually required** to go live?

## Support

Who **helps us** after the sale?

## Flexibility

Are we locked in to a **contract** or can we flex and grow?

## Total Cost

Usage or seat **fees**, configuration, **training**, and ongoing management **effort**

# VENDOR RELATIONSHIPS

Keep in touch. Grow together

## As an Ongoing User

- Communicate what's **working well** or what you think **could be better**
- Take advantage of future **demos and trainings**
- **Read the release notes!**
- Participate in **user groups** or forums

**AUDIENCE Q&A**



Break

Time



**AGENCY OPS  
ADVANTAGE** 

**Big I of Illinois  
CONVO  
October 2026**

# **INSURTECH PERSPECTIVES:**

## **Building the Agency of the Future**

# MEET TODAY'S PANELISTS



**Kyle Geoghan**



**Kevin Rall**



**Sean Steigerwald**



**Carl Ziade**





# FOR MORE INFORMATION



AGENCY OPS  
ADVANTAGE 

Big I of Illinois  
CONVO  
October 2026

# TURNING IDEAS INTO ACTION



# RECAP AND KEY TAKEAWAYS



**BETTER ROI FROM YOUR TECH STACK  
DOESN'T HAPPEN BY CHANCE.  
IT HAPPENS BY DESIGN.**

# KEY TAKEAWAYS

01

## Design It

Technology is an operational strategy, not shopping

02

## Start Where You Are

Use what you have, then decide what you need

03

## Test Before You Buy

Stress-test with the scientific method & establish ROI criteria

04

## Protect Your Data

Clean AMS data and a practical AI policy are essential

05

## Develop Your People

Train on new tools and workflows, and help them level up

# DO'S

- ✓ **Make sure you don't already have a solution for this problem**
- ✓ **Negotiate trials & run head-to-head comparisons**
- ✓ **Involve your team**
- ✓ **Communicate updates and changes to plans**

# DON'TS

- ✗ **Consider a tool without knowing exactly what problem is to be solved**
- ✗ **Solve one problem by creating others**
- ✗ **Expect performance not to be impacted (temporarily)**
- ✗ **Forget to lead by example**



**AUDIENCE Q&A**

## Building Your Agency's Technology Stack Check Out

Scan the QR code for IL CE  
credit.

If you need assistance, see a Big I Illinois  
volunteer near the doors now  
(not at the end).



WiFi is: MarriottBonvoy\_Conference Password: WRB

Three overlapping chevron arrows pointing right, rendered in a lighter blue shade than the background, positioned on the right side of the image.

**YOUR CHALLENGE**

# TAKE ACTION

## ✓ Your 30-Day Commitment

Pick One:

- **Workflow** to improve
- Existing **tool** to utilize more fully (maybe it's just your AMS!)
- **Priority** to put on your roadmap

**AGENCY OPS**  
**ADVANTAGE** 

jessica@agencyopsadvantage.com

*FREE DOWNLOAD*

## Tech Stack Audit Worksheet



Tell me what you thought of today's session and you'll get a FREE downloadable **Tech Stack Audit Worksheet**