

2026 Digital Maturity Checklist

Is your brokerage ready for the future? Use this checklist to evaluate your current business systems.

Core Integration & Data

- ☐ **Single Source of Truth:** Does your CRM integrate two-way with Insight or Winbeat, eliminating the need to re-type data?
- ☐ **Microsoft Ecosystem Sync:** Are your emails, calendars, and client records automatically synchronized within a single interface?
- ☐ **Automatic Filing:** When you receive an email or document, is it automatically tagged and filed against the correct client/policy record without manual intervention?

Compliance & Risk

- ☐ **Audit Trails:** Is every interaction—email, note, and status change—logged in a reportable thread for easy auditing?
- ☐ **Proactive "Red Flags":** Do you have an automated process to immediately notify leadership when a client is identified as "at-risk"?
- ☐ **Standardized Guardrails:** Can a new staff member follow a guided, pre-built workflow for complex tasks like claims management or Workers Compensation?

Workflow Automation

- ☐ **Renewal Visibility:** Can you instantly see a color-coded dashboard of all upcoming renewals for the next 90 days across your entire team?
- ☐ **Pre-filled Data Collection:** Do you send pre-filled digital forms to clients that automatically update your system once they hit "Submit"?
- ☐ **Automated Follow-ups:** Does your system automatically trigger SMS or email payment reminders to debtors as an extension of the renewal workflow?

Performance & Scale

- ☐ **High Value/Low Admin Ratio:** Do your brokers spend at least 80% of their day on high-value client advisory rather than administrative "double-keying"?
- ☐ **Scalability:** Can you add more users or new acquisitions to your business without your per-user licensing costs skyrocketing?
- ☐ **AI Readiness:** Is your data clean, structured, and ready to be leveraged by agentic AI tools in 2026?

Did you say "No" or "Unsure" for more than three items?

Your brokerage may be losing significant profit to operational inefficiencies. Book a discovery call with our team and we'll walk through your goals, your current environment, and how Fortix can create clarity and efficiency for you.

[Book a FREE discovery call](#)

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