**Ensure a best-in-class digital experience for agents**

Ease of doing business is an important factor in every agency’s decision to partner with insurers. Carriers should strive to deliver the best possible digital experience for their agency partners, but it can be challenging to know where improvement is most needed in order to remain competitive.

As an example, roughly half1 of all carriers have deployed self-service onboarding, which significantly expedites an agent’s ability to begin selling—for the other half, it will become increasingly critical to provide this service, too.

To identify areas where your systems and processes may need additional attention, we encourage you to share this survey with your agency partners for detailed feedback. Customize this template below to best fit your business and collect the feedback you need to provide a best-in-class agent experience.

1 “[Agent Digital Experience: A New Battleground in Property and Casualty Insurance](https://www.celent.com/insights/317843255)” (Celent)

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***Digital experience survey template for insurers***

1. **Which lines of business do you sell? Select all that apply.**
   1. Businessowners’ policy (BOP)
   2. Commercial
   3. Commercial auto
   4. Commercial property
   5. Dwelling fire
   6. Excess and surplus (E&S) markets
   7. General liability
   8. Home
   9. Motorcycle
   10. Personal auto
   11. Personal (other)
   12. Renters and condos
   13. Small commercial
   14. Workers’ compensation
   15. Other:
2. **What is your primary role?**
   1. CSR
   2. Executive or Management
   3. Marketing or Placement
   4. Principal
   5. Producer
   6. Other:
3. **How quickly were you able to complete the onboarding process with us?**
   1. Within one day
   2. Within two to four days
   3. Within one week
   4. Within one to two weeks
   5. It took more than two weeks
4. **How much of our processes can you complete digitally?**
   1. All. I can complete all forms online.
   2. Most. I occasionally have to complete physical forms.
   3. Some. I regularly have to complete both digital and physical forms.
   4. Little. I mostly have to complete physical forms.
   5. None. All of my work must be submitted through physical forms.
5. **How quickly are you usually able to receive a quote from us?**
   1. Immediately
   2. Within one day
   3. Within one week
   4. Within two weeks
   5. It takes more than two weeks
6. **What access to claims notes do you have in order to assist your clients?**
   1. I have access to all of the information I need.
   2. I have access to most of the information I need.
   3. I have access to some of the information I need.
   4. I have access to little of the information I need.
   5. I have access to none of the information I need.
7. **How satisfied are you with our loss control recommendations?**
   1. I have access to all of the tools and data I need.
   2. I have access to most of the tools and data I need.
   3. I have access to some of the tools and data I need.
   4. I have access to little of the tools and data I need.
   5. I have access to none of the tools and data I need.
8. **How satisfied are you with your ability to share documents or participate in book rolls digitally?**
   1. Very satisfied
   2. Somewhat satisfied
   3. Neither satisfied nor dissatisfied
   4. Somewhat dissatisfied
   5. Very dissatisfied
9. **Overall, how would you rate your digital experience with us?**
   1. Five stars
   2. Four stars
   3. Three stars
   4. Two stars
   5. One star
10. **What else would you like to share about ways we can improve our ease of doing business?**
    1. [Enter your answer]