



Program Administrators Association

Program Transition Checklist

- Strategic Plan with expectations and commitments clearly outlined with the Carrier

- Project Plan with agreed timelines/clear accountabilities
 - Underwriting
 - Systems
 - Claims
 - Billing/Collections
 - Marketing
 - Risk Engineering
 - Contracts

- Empowered Project Manager on both sides

- Conduct deep-dive into UW forms/coverages

- Focus on the impact to the Customer

- Transparency being practiced

- Address anything that deteriorates Trust

- Identify and address cultural differences

- Devote adequate resources (like it is a merger)

- Be flexible throughout the process

- Regular meetings being held on multiple levels

- Plan ways to develop deeper relationships and blow off steam