

The Going Digital Technology Checklist for Benefit Brokers

Questions to Ask:

Choice:

- Do I need this technology to achieve my goals?
- Do I need this technology to more quickly and efficiently achieve my goals?
- Do my clients need this technology to achieve their goals?

Cost:

- Can my clients and I afford to buy the technology?
- Can we afford to use the technology?
- Can we afford to stop using it?

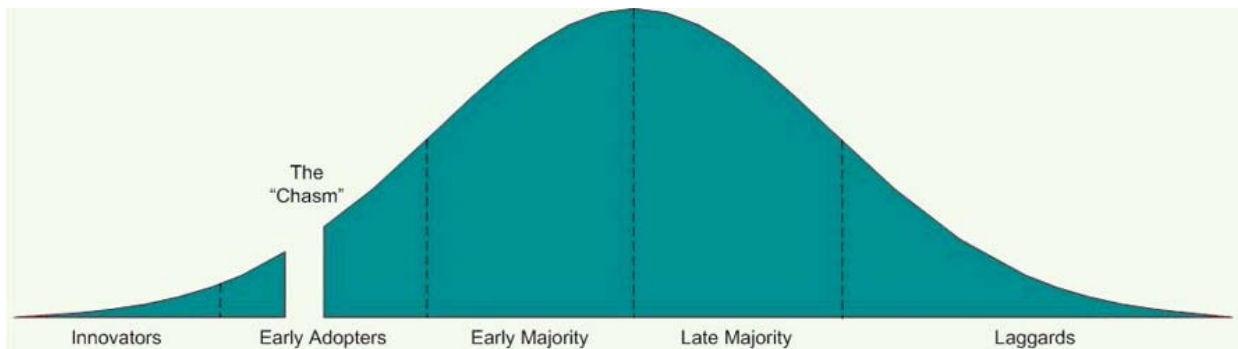
Confidence:

- Will the technology perform as promised?
- Will my and my clients' data be protected?
- Will I be hiring a competitor?

Comfort:

- What is my spot on the adoption curve for this technology? *See below*
- What have others experienced using this technology?
- What do I have to change to use this technology?

Finding your place on the adoption curve:



From "Crossing the Chasm" by Geoffrey A. Moore

Innovators: Pursue technology aggressively and early

Early Adopters: Embrace the promise of technology—and the risk

Early Majority: Value technology's promise, but want some proof

Late Majority: Hesitate to embrace technology until it's established and proven

Laggards: Don't need no stinking tech