

# Agents Council for Technology

## ACT Meeting

*Tables with **Power Strips** in front*

*Mar **22**-23, 2017  
Nashville, TN*



Network: **NetVU**

Password: **conf2017**

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# *Housekeeping*

Name Badges – **GET THEM.**

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# Anti-Trust Policy

We operate pursuant to the IIABA Antitrust Policy:

- Everyone is asked to participate with their industry hat on.
- We will focus on industry issues—such as improving agent-carrier connectivity, heightening industry efficiency, improving customer service, improving agent-carrier marketing and sales.
- We should not discuss at this meeting or in private conversations:
  - Individual carrier or vendor marketing or pricing strategies
  - The level of agency compensation or premium levels
  - Doing business or not doing business with particular business entities
  - Allocating markets in any fashion
  - Reaching agreements among our individual businesses

***We will monitor the discussions & terminate the discussion should it stray into one of these prohibited areas.***

# *ACT Mission statement*

Our mission is to bring all independent agent & broker distribution stakeholders together to advance the use of the **most effective** agency workflow technologies which enhance productivity, sales & marketing, service, and security.

An IIABA program, ACT focuses on strategic trends and drives improvements to the customer experience, using virtual work groups and in-person meetings. We provide recommendations & best practices, webinars, and videos that can be used by all of our stakeholders, each of which have an equal voice.



# High-Level for Day 1

Wed, Mar 22

1:00 pm – 5:00 pm **ACT Meeting**

5:30 pm – 6:30 pm **ACT Attendee Reception - Bongo Java, Omni Hotel**

7:30 pm - 9:00 pm **NetVU Awards Gala (*if invited*) or Dinner on your own**

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# **ACT Committee**



**Jay Byrnes**  
***ACT Committee Chair***



**Jon Jensen**  
***IIABA Executive  
Committee Liaison***



**Claudia McClain**



**George Robertson**



**Nancy Nicklow**



**Boyd McGehee**



**Joyce Sigler**

***A quick welcome from Kitty Ambers, CEO of NetVU***



# WELCOME!

**ACT  
Members**

**First-Time Attendees**

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# *New ACT Member*



*Tom Tempeny, Director of Corporate Services*



# *New ACT Member*



Insurance Agent

***Matt Aaron & Kiki Johnson, Co-Founders –  
Insurance Agent Mobile Application***

# *New ACT Member*



***David Brinkman, President & CEO***

***Dianna George, General Manager of Global Insurance Solutions***

# *New ACT Member*



**duckcreek**  
technologies

***Curt Stevenson, Chief Digital Officer***

***Lisa Gilgan, Director of Training***

***Ken O'Sullivan, Product Manager***

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# **ACT Member Best Practices**

## **Carriers:**

- Periodic calls (30-40 mins)
- Industry trend discussion
- Discuss ACT Work Group involvement
- ACT engagement at company meetings

## **Vendors:**

- Webinars, User Group involvement

## **Agents/Brokers & State Associations:**

- Access to E.D./staff/others on trends, recommendations
- Speaker/Panel involvement at meetings.

# ACT Member Best Practices

**ACT website:** <http://www.independentagent.com/ACT>

- Open to all
- Free resources for education & advocacy

**Articles: ACT News, IA Publications:**

- Opportunity to bring voice forward on industry tech trends, challenges.
- [Subscribe](#)



**Other Big 'I' resources:**

- VU, YA, Diversity, Best Practices

# *ACT & Other IIABA Programs*



# First Session: HSB & the IoT



Marc Saulsbury - VP, HSB Ventures

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# BREAK TIME!

*Be back in 20 MINUTES*



Network: **ACORD**  
Password: **acord2016**

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# The Customer Experience Journey – Observations from the Field

**Marty Agather & Michael Rabinowitz –  
TrustedChoice.com**



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# Stakeholder Update



March 2017

# ID Federation Update



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# Quick Background

- ID Federation – nonprofit industry organization of carriers, agents, technology providers
- SignOn Once – a process, not a product to buy



# Latest Developments

- Vertafore certification
- Applied Systems status
- Educational sessions at NetVU Conference



# Carrier Benefits

- Reduce help desk calls for managing IDs and passwords
- Manage precise user identities – no more shared or group IDs
- Increase real-time transactions
- Enhance security

# Carriers: Get Involved

- No cost to enable SignOn Once; no certification required
- Review Participation Agreement and Trust Framework docs at [idfederation.org](http://idfederation.org)
- Upcoming informational meetings:
  - May 25 (hosted by Liberty Mutual)
  - September (TBD)



# Agents: Get Involved

- No software to buy
- Ask your management system provider
- Learn more about SignOn Once at [signononce.org](http://signononce.org)



# Thanks for Your Support



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# Day 1 Wrap-Up

## This Evening:

**5:30 pm – 6:30 pm** ACT Attendee Reception - *Bongo Java, Omni Hotel*

**7:30 pm - 9:00 pm** *NetVU Awards Gala (if invited) or Dinner on your own*

## Tomorrow:

**7:30am -8:15 am** ACT Breakfast – **Foyer outside Room 106ABC**

**8:30am - 11:30am** ACT Meeting - **Room 106ABC**

**12:00am - 5:30pm** *NetVU attendees to NetVU Opening Luncheon at 12:00pm.*

*\*\* ACT Meeting attendees are invited to attend [Thu pm NetVU activities](#).*

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# *Have a great evening!*



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