

Agents Council for Technology Meeting

May 20-21, 2019



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



Network: **ACC19**

Password: **Havingfun** ← *Case-Sensitive*



Housekeeping

Name Badges – *Don't have one?*

See Lisa at registration table just outside

Help spread the word via Twitter

#ACT4Agents



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 should they 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.



FY19 ACT Committee



Jay Byrnes
ACT Committee Chair



John Costello
***IIABA Executive
Committee Liaison***



Boyd McGehee



George Robertson



Nancy Nicklow



Cindy Hower



Paul Peeples

WELCOME!

First-Time Attendees

#ACT4Agents



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WELCOME!

First-Time Young Agents & Sponsors

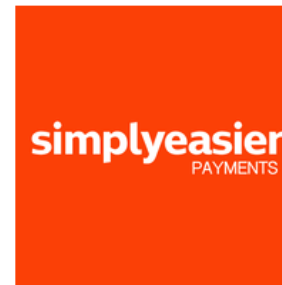
ACORD



MetLife



Formerly NMSDATA
neilson
MARKETING SERVICES



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New ACT Members

New ACT Members



WESTERN NATIONAL
INSURANCE

The relationship company®

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New ACT Members



New ACT Members

The logo for DAiS (Digital Asset Information System) features the letters 'DAiS' in a bold, dark blue sans-serif font. A small blue square is positioned above the dot of the lowercase 'i'.The logo for act. (Agents Council for Technology) features the word 'act.' in a black sans-serif font, with a small 'SM' trademark symbol above the period. A solid purple circle is placed to the right of the period. Below the text, the words 'AGENTS COUNCIL FOR TECHNOLOGY' are written in a smaller, black, all-caps sans-serif font.

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New ACT Members



Thank You ACT Supporting Members!

ACORD
AgentLynx by EZLynx
Allstate Independent Agents (incl. Encompass)
Angela Adams Consulting Services
Applied Client Network
Applied Systems/IVANS
AssureSign
AVYST
BrokerLift
Central Insurance Companies
Chubb
Citrix Sharefile
CNA
Columbia Insurance Group
CoreLogic Insurance Solutions
CSIO (Centre for Study of Insurance Operations)
CyberClearSafe
DAIS
Dryden Mutual Insurance Company
Duck Creek Technologies
EMC Insurance Companies
EZLynx

Grange Insurance
Hartford Steam Boiler
HawkSoft
HawkSoft User Group
IBAC (Insurance Brokers Association of Canada)
IIABA
Insurance Agent Mobile Application
InsureZone
ITC (Insurance Technologies Corporation)
LexisNexis Risk Solutions
Liberty Mutual Insurance
Merchants Insurance Group
MetLife
Nationwide Insurance (incl. Allied)
Neilson Marketing Services and Programbusiness.com
NetVU (Network of Vertafore Users)
New York Central Mutual Insurance
Nexsure User Group
North American Software Associates (NASA)
Ohio Mutual Insurance Group
Partner XE User Community
Penn National Insurance

Progressive
Rigid Bits
Safeco Insurance
Selective Insurance Company of America
Simply Easier Payments / EchoSage
State Auto Insurance Companies
Steve Anderson Consulting
Strategic Insurance Software (SIS)
The Cincinnati Insurance Companies
The Hanover Insurance Group
The Hartford
The Main Street America Group
The Motorists Insurance Group
The W.R. Berkley Companies
Travelers
Utica National Insurance Group
Vertafore
Western National Insurance Group
Westfield
WSIA
Xanatek
XDimensional Technologies



Independent Insurance Agents
& Brokers of America, Inc.

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High-Level



Mon, May 20

12:00 pm – 5:30 pm **ACT Meeting**

6:30 pm – 8:00 pm **Informal Meet-Ups in area**

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



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← *Case-Sensitive*

Meeting App

***Cincinnati meeting app:
'BigEvents'***

Link in 'Attendee Insider'

**Download app from
Play Store or Apple Store**

*In the app, look for:
"May 20-21, 2019 ACT Meeting"*



Meet-Ups

ACT Gets Social!!

***Meet Your Group in the Westin lobby at
6:30 pm***

Polling

Text 'ACT4Agents' to 22333 once to join

I represent:

Agency / Brokerage

Insurance Carrier

Vendor / Technology Provider

User Group / Association

Consultant / Other

FIRST Session!

Carrier Innovation and Innoscouting



Sudheendra “SG” Galgali
American Modern Insurance Group



Next Session

APIs and the IA Distribution



Jason Kolb
DAIS Technology, LLC





Be back in 20 MINUTES

Got Feedback?

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Next Session

ACT 'API' Work Group Discussion



Steve Anderson
Steve Anderson
Consulting



Duke Williams
Simple Easier
Payments / EchoSage



ACT 'API' Work Group - Background

WG initial focus

Discussions with Stakeholders;

Insurers,

Agent/Association,

Tech Providers

General discussion on outcomes to-date

WG Goal: *ID 1-3 actions ACT should take on APIs
next 6-10 months*

ACT 'API' Work Group

Your Input *NEEDED*



Have you currently implemented or use any form of API?

Yes!

Considering

No

Unsure

ACT 'API' Work Group

Further clarification on uses, please



(Word Cloud) For those using an API, share how you're using them

ACT 'API' Work Group

If not, why?



If you haven't used/implemented an API, why not?

ACT 'API' Work Group – Forward Focus

WG thoughts

Help to connect

ID: True issues vs. misconceptions

Address security?

L-H Fruit: Payments, Lienholder/Mortgagee

Education (*next slide*)

ACT 'API' Work Group – Forward Focus

Education

- ☐ ID info collectors already in place:
[Coverager](#), others
- ☐ Webinars – to distribute at state level ?
- ☐ TED-style talks at state level ?
Train-the-trainer
- ☐ Security: How it is done
- ☐ *OTHER?*

ACT 'API' Work Group – Next Steps

API Work Group ongoing meetings

- ☐ Several to-date, most recent Apr 16
- ☐ Incorporate your feedback
- ☐ Want to join? Email ACT@iiaba.net
- ☐ *OTHER?*

Next Session

Agency Resources for Data Analytics & Insights



Jeff Smith
CEO
OIA / IntellAgents



Judy Sivy
Director of Agency Services

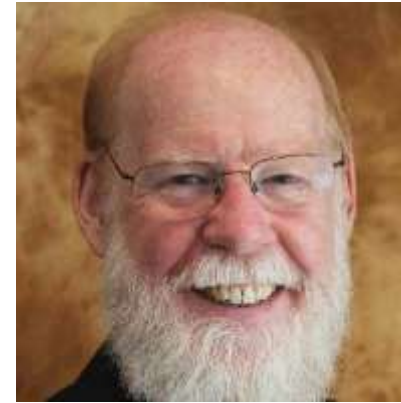


Next Session

ACORD – Update on Forms/Standards/Industry Collaboration



Malou August
SVP, Stds & Membership
ACORD



Frank Sentner
Sentwood Consulting



Today's Final Session!

ACT SFI Work Group: Focus Areas for 2019/2020



Rick Morgan
CMO – WAHVE
Rick Morgan Consulting



Strategic Future Issues & Changing Nature of Risk Update

- Trends Report
- IoT Deep Dive
- Combining SFI & CNoR
- New Advisories
- New Deep Dive



The screenshot shows the homepage of the Agents Council for Technology (ACT). At the top, a blue banner reads "Technology Solutions for Your Business". Below this, there are social media icons for YouTube, LinkedIn, Twitter, and Facebook, along with "Email", "Tweet", and "Like" buttons. The main content area features a sidebar on the left with a navigation menu: "Technology Solutions for Your Business", "ACT Members", "ACT Work Groups", "Be Efficient", "Internet Marketing", "Planning and Security", "Carriers, E & S Markets", "Webinars", and "Resources". The main body has a central article titled "When you're looking for technology solutions for your agency, turn to the Big 'I' Agents Council for Technology." with a sub-headline about blueprints for disaster planning, cybersecurity, and customer experience. Below the article are three featured sections: "Cyber Guide 2.0" (with a padlock icon), "Key Trends" (with a magnifying glass icon), and "Internet of Things" (with the "IoT home." logo). The bottom of the page features the "act." logo with a purple dot and the text "AGENTS COUNCIL FOR TECHNOLOGY" below it.

Technology Solutions for Your Business

When you're looking for technology solutions for your agency, turn to the Big "I" Agents Council for Technology.

The industry's leading technology experts provide blueprints on disaster planning, cybersecurity, customer experience, and other emerging trends to help your agency. Look to ACT when you are looking for best practices or if you want to influence the industry's technology direction, join an ACT meeting or virtual work group.

Cyber Guide 2.0
Online and print cyber resource for agencies.

Key Trends
What technology is poised to change the way you do business?

IoT home.
Internet of Things
Connected devices are changing how we do business.

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Potential technologies for new Advisories

A) Microservices & APIs – Use Cases vs. technology.

This topic might also be combined with Search and Machine Learning.

B) DNA – Coverage, misuse of private data, disease predisposing, underwriting.

C) Communication: SMS, Texting, Messaging/social platforms.

D) Other

Which topic(s) do you want ACT to address for new Advisories?

New 'Deep Dive' Topics

- A. AI:** The ethics around AI, use cases, agent-side capabilities.
- B. Voice Computing:** Significant advancements in progress, uses in IA distribution.
- C. Drones/Visualization** – Satellites and drone video.
- D. Sharing Economy** Marriott/AirBnB/VRBO-type sharing, personal car rental (Truro), etc.

Which 'Deep Dive' topics should the SFI work group address next?

Artificial Intelligence (AI)

Voice Computing

Drones/Visualization

Sharing Economy



Wrap-Up

Day 1 Wrap-Up

This Evening:

- 6:30 pm – 8:00 pm Informal Meet-Ups *Locations close to DECC*
Whitnee/Boyd – marching orders

Tomorrow:

- 7:00 am - 8:00 am Breakfast *Junior Ballroom D, 3rd Floor*
- 8:00 am - 12:00 pm ACT Meeting, Day 2 *Junior Ballroom A, 3rd Floor*

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See you tomorrow morning!



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