



AGENTS COUNCIL
FOR TECHNOLOGY.

Vital ACT Resources

Assistance When You Need It Most

Virtual ACT Meeting

April 22, 2020

WHAT are We?



- Big "I" program that has brought IA stakeholders together since 1999
- Volunteer-driven program; *Carriers, Agents, Vendors, Associations, User Groups*
- Advancing effective: Technology workflows, business processes
- Over 60 financially [supporting ACT Members](#)
- ***Our Goal:*** Consensus on best workflows, advocacy using **Work Groups**

FREE for Big 'I' agents & brokers!

ACT Staff



Ron Berg
Executive Director



Ginny Winkworth
Program Manager

FY20 ACT Committee



Cindy Hower
ACT Committee Chair



John Costello
*IIABA Executive
Committee Liaison*



Boyd McGehee



Paul Peeples



Jeanie Giesler



Will Infantine

THANK YOU to our Supporting ACT Members!

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

HawkSoft
Hartford Steam Boiler
IBAC (Insurance Brokers Association of Canada)
IIABA
Indio
Insurance Agent Mobile Application
InsureZone
ITC (Insurance Technologies Corporation)
Levitate
LexisNexis Risk Solutions
Liberty Mutual Insurance
Merchants Insurance Group
MetLife
Nationwide
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 W.R. Berkley Companies
Travelers
Utica National Insurance Group
Vertafore
Veruna
Western National Insurance Group
Westfield
WSIA
Xanatek
XDimensional Technologies



AGENTS COUNCIL
FOR TECHNOLOGY.

Vital ACT Resources

Assistance When You Need It Most

Disaster & Contingency Planning



Issue:

Ability to seamlessly continue business and provide exceptional customer service

ACTions:

- Agency Disaster Plan (*Downloadable; "Brand & Use"*)

[Independentagent.com/ACTDisasterPlan](https://independentagent.com/ACTDisasterPlan)

- Agent's Perspective on Disaster Readiness (*Webinar on NC agent's insights*)

[Independentagent.com/AgtDisasterReadinessWebinar](https://independentagent.com/AgtDisasterReadinessWebinar)



Remote Work

- Remote Work Best Practices
 - Type of arrangements
 - Creating success for a Home Office
 - Security
 - Tips & Challenges

Independentagent.com/ACTRemoteWorkBPs

- Remote Work Agreement
 - Expectations, Performance, Computer/Security, Monitoring

Independentagent.com/ACTRemoteWorkAgreement



Texting / eDelivery / ADA



Issue:

Staying out of E&O territory

ACTIONS:

- Agency-Customer Texting Agreement (*Required by FCC*)
[Independentagent.com/legal-advocacy/FAQs](https://independentagent.com/legal-advocacy/FAQs) *
- Agency-Customer eDelivery Agreement (*Docs, portal, eSignature*)
[Independentagent.com/legal-advocacy/FAQs](https://independentagent.com/legal-advocacy/FAQs) *

*** Requires Big 'I' ID/password**



Security & Cyber



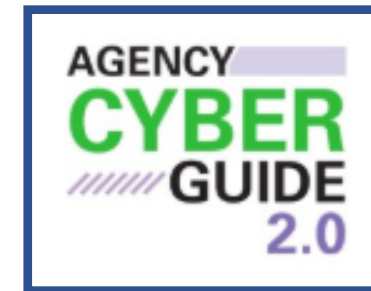
Issue:

Increased Attack Surface exposures, ensuring employee & agency security

ACTions:

- Agency Cyber Guide

[Independentagent.com/ACTCyber](https://independentagent.com/ACTCyber)



- Written Information Security Plan template (*requires Big 'I' ID/password*)

[Independentagent.com/ACTCyberPolicy](https://independentagent.com/ACTCyberPolicy)



Your Website

Issue:

Exposures & potential litigation

ACTions:

- Agency Website Privacy Policy (Downloadable, *"Brand & Use"*)

[Independentagent.com/legal-advocacy/FAQs](https://independentagent.com/legal-advocacy/FAQs)

- ADA & Accessibility

[Independentagent.com/ACTADA](https://independentagent.com/ACTADA)



Have You Subscribed?



Visit Independentagent.com/ACTNews
and subscribe to our bi-monthly eNewsletter.

Next ACT Meeting

Fall 2020

- **Sep 10th** (afternoon), **11th** (morning); Kansas City, MO
- Co-locating with Big 'I' Fall Leadership Conference
- Registration coming ~June 8

Future ACT Meetings

- **May 2021**; co-locating with NetVU Accelerate - Denver, CO
- **Sep 2021**; co-locating with Applied Net – *location TBA*

Independentagent.com/ACTMeeting

Thank you

Did you miss a session?

- On Demand – April 23
- Q&A with the Presenters!

Independentagent.com/ACT

