Ron Berg
Vital ACT Resources

THE ACT MEETING GOES VIRTUAL

Questions and Answers from the ACT Meeting
# April 22, 2020

Q: What role can an agency representative play in ACT? What type of agency employee is best?

A: There are a few different roles – knowing that agency reps do not you do not have to be a technology expert to be involved in ACT, agency personnel can sit in on various work groups to learn about emerging technology trends, cyber & security, customer experience, and a number of other areas. What we truly need within ACT is agency input on their current workflow challenges so that our tech experts from carries and vendors. Agency reps can help drive these work group discussions. For more on our current work groups, visit **Independentagent.com/ACTWorkGroups**

Agency reps can also be involved in our two annual in-person meetings – attendance is free for Big 'I' agency members. We co-locate with the major user group conference to get more awareness on ACT. At these ACT Meetings, agents can participate in discussions and learn as a part of the audience, or participate as a panelist, delving into workflow challenges, agency best practices and a number of other areas.

Q: I noticed that some ACT resources are public, and some require ID& password - Can anyone get an ID & password to access resources?

A: Over 95% of all ACT resource on our website are open and free to all. However we do have several resources that we have worked with the Big 'I' general counsel to create specifically for Big 'I' member agents – Tools like a downloadable website privacy policy, an Agency-Customer Texting Agreement and others. To keep these for agents only, we require our agent members log in with their Big 'I' ID & password. Only Big 'I' member agencies have this level of access, and most of these resources are located on our Big 'I' 'Legal Advocacy' web page under '**Memoranda and FAQ**'.
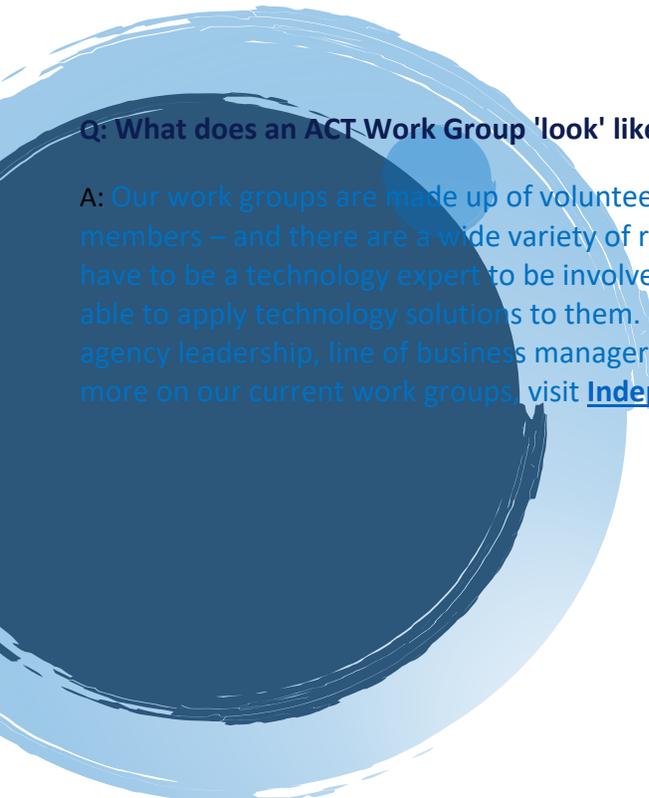
Q: What does an ACT Work Group 'look' like? How are they formed, and what roles participate?

A: Our work groups are made up of volunteer reps from our carrier, vendor, agent, user group, and association members – and there are a wide variety of roles involved with each. For agents, a key point is that you do not have to be a technology expert to be involved in ACT, we simply want your insights on workflow challenges to be able to apply technology solutions to them. So for agencies, roles typically involved in our Work Groups can be agency leadership, line of business managers, social media staff, or technical support – Any or all of these. For more on our current work groups, visit **Independentagent.com/ACTWorkGroups**