



## Agents Council for Technology Schedule & Agenda

**May 5, 2014**

Rosen Shingle Creek Hotel & Resort—Orlando, FL

**Dress:** *Business Casual for all sessions*

**Badges:** *Pick up outside ACT meeting room*

### **Schedule of Meetings & Events**

**\*\* ACT Meeting will be held in the St. Johns Room, 32/33/34 \*\***

#### **Sunday, May 4**

8:00 AM – 6:00 PM ACORD LOMA - Registration desk Open  
8:00 AM - 3:00 PM ACE Bootcamp  
8:00 AM - 1:00 PM ACORD LOMA - Golf Outing  
3:00 PM – 6:00 PM ACE Exams  
5:30 PM – 7:30 PM ACORD LOMA - Opening Night Reception

#### **Monday, May 5**

9:00 AM – 11:45 AM ACORD LOMA - Concurrent and General Sessions  
11:45 AM - 12:45 PM ACORD LOMA - Lunch and Networking  
**12:45 PM - 5:15 PM ACT Meeting**  
5:30 PM - 7:00 PM ACORD LOMA- Exhibit Hall, Meet & Greet reception

#### **Tuesday, May 6**

8:00 AM - 8:45 AM ACORD LOMA - Continental Breakfast  
8:45 AM – 10:00 AM ACORD LOMA - Super Session  
10:30 AM – 11:30 AM ACORD LOMA - Concurrent Sessions  
11:30 AM – 1:00 PM ACORD LOMA - Lunch & Networking  
1:00 PM – 2:45 PM ACORD LOMA - Concurrent Sessions  
3:00 PM – 5:30 PM ACORD LOMA - Closing Event & General Sessions Closing Keynote

**ACT Agenda**  
*'St. Johns' Conference Room, 32/33/34*

**Monday, May 5** (12:45—5:15 PM)

1. Chair's Welcome, Antitrust Statement, Meeting Opening  
**(12:45 - 1:00 PM)**  
Jim Armitage (Arroyo Insurance Services) & Ron Berg (ACT)
2. High-Level Progress Updates on ACT Work Groups  
**(1:00 - 1:30 PM)**
  - Policy Delivery – *Susan LaBarre, Chair*
  - ACT Communications – *Peter van Aartrijk, Chair*
  - Customer Experience – *Judy DeLaRosa & Claudia McClain, Co-Chairs*
  - Agent Technology Agreements – *Jim Armitage, Chair*
3. ID Federation Update  
**(1:30 - 2:30 PM)**  
Teresa Addy (EMC) & Jim Rogers (The Hartford)  
Review of launch, open discussion
4. Panel: Strategy on Real Time Transactions  
**(2:30 – 3:00 PM)**  
Casey Herring (Schultheis Insurance Agency) & David Victor (QQ Solutions, Inc.)

**\*\* Break \*\*** **(3:00 - 3:15 PM)**

5. Breakout sessions **(3:15 - 4:30 PM)**
  - ACT Communications - Getting Our Message Out (*Peter van Aartrijk, Facilitator*)
  - Engaging add'l Agents, Young Agents, Diversity (*Rick Morgan/Ron Berg, Facilitators*)
  - Driving Technology Utilization & Adoption (*Jim Armitage, Facilitator*)
6. Reports from the Breakouts  
**(4:30 – 5:00 PM)**
  - ACT Communications (*Peter van Aartrijk*)
  - Involving Agents/Young Agents/Diversity (*Rick Morgan, Ron Berg*)
  - Driving Technology Utilization & Adoption (*Jim Armitage*)Jim Armitage & full group
7. Summing Up and Meeting Takeaways  
**(5:00 – 5:15 PM)**  
Jim Armitage & full group

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### **Times & Places for Next Meetings**

- ❑ **October 27, 2014** ACT Meeting (1:00 PM – 5:00 PM)
  - In conjunction with the ACORD Implementation Forum (AIF) -
  - Marriott Harbor Beach Resort -Fort Lauderdale, FL
  
- ❑ **February, 2015** ACT/AUGIE Meetings
  - *Dates and location to be communicated soon*