

BEST PRACTICES GUIDE TO
YOUNG AGENT
PROGRAMS

ENGAGING EMERGING LEADERS

BIG i[®]
YOUNG AGENTS.

A Best Practices Guide...

Attracting and engaging young professionals is vital to the future of the industry and the organization. This guide is designed to help volunteers and state association staff engage young professionals and create experiences that cultivate commitment to the industry, association and personal success. Each chapter includes a best practices checklist to make achieving excellence easier. The Big "I" national Young Agents Committee thanks you for your commitment to the rising leaders of the industry.



4 Getting Started

8 Understand & Attract Young Agents

10 Young Agent Activities

14 Invest



16 Young Agent Meetings & Events

18 Communications

20 Resources

Table of **CONTENTS**



Getting Started



State Association Board & Staff Support

Buy-in. Skin in the game. There are plenty of clichés meaning early adoption and that is what you need from your association’s volunteer leadership to create or revitalize a young agents program. The first step? Define your goals and share them with state staff and leadership. Whether you are one or a group of young agents that want to start a committee or a staff person who sees the need to engage young agents to secure the future of the association, volunteer leader support is imperative to your success. Winning their support for your group’s mission and goals is vital. Many leaders will welcome getting their agency’s young agents involved in the Big “I”. Often, state leaders have already committed years to the mission of the organization and their legacy depends on young agents getting involved.

Create Your Mission & Goals

Sample Mission

The mission of the young agents program is to help young insurance professionals or those new to the industry cultivate skills for a successful career by engaging them in association activities.

Sample Goals

- ★ Offer experiences to young agents to help them build their career and foster support of the association
- ★ Develop meaningful interactions between young agents and the state and national association through events and communications
- ★ Engage these future industry decision makers in association events and volunteer roles.

Committee Make-Up

Once your group has earned the support of state leadership, it’s time to create the committee. Do you have enough people-power to meet your objectives? Who will be responsible for what?

Committee Positions & Terms

Committee positions can mirror your state association board, the Big “I” national Young Agents Committee (YAC) or be more loosely defined—it’s really what works best for your state. At a minimum, you’ll want a chair and chair-elect position to help maintain program consistency. Other potential positions are vice president, secretary and treasurer. Often the more administrative roles (secretary and treasurer) are filled by association staff with committee oversight. Depending on the committee’s events and activities cycle, it may be best to have multiple-year terms. This gives volunteers a chance to really connect with the mission and implement program enhancements. Your election process will have to adhere to your state’s bylaws. Contact your state association for information and direction.

How Many Members Should Be On The Committee?

There’s no right or wrong answer to this question. You want enough members to achieve a fair representation of your constituents but not so many that committee meetings are unmanageable. You might start with four members and then add to that number as your activities and fundraising needs grow. Look to your state board for guidance. Check your association’s bylaws for voting requirements. A larger committee makes it harder to get full attendance at meetings. If you don’t have a quorum, it could affect voting and related actions.



Task Forces & Workgroups

Task forces and workgroups are a great way to get more young agents involved and help lighten the workload. You can create small working groups with a very clear charge, for example, planning a community service project. This gives your committee an opportunity to introduce more young agents to the Big “I” and engage more participants and leaders.

Committee Breakdown

No two states are the same. Some committees are wholly appointed by the state board while others find a regional approach is more effective. You can divide the state based on local boards, and if you don't have local boards, create manageable geographic regions. Create the committee with a representative from each region who acts as the main liaison to young agents in that area. This system ensures your members are fairly represented and makes marketing and division of duties easier. Whether your committee uses a regional approach or simply selects the most motivated young agents, make sure duties and roles are clearly defined. Young agent outreach should be an important part of their job description. Member-to-member communication is most effective, and when you deliver a marketing message, have committee representatives follow up with the same group of agents throughout the year to help build rapport.

Volunteer Orientation

While it may seem like a rerun to seasoned YAC members and staff, each election cycle requires an orientation for new committee members. If you've engaged young agents in other volunteer activities, they should be somewhat familiar with the committee's charge. But orientation enables you to lay out the guidelines and commitment. Create a job description outlining the level of commitment you expect from each committee member including what meetings they must attend, what outreach is required of them and what the time commitment looks like.

Company Marketing Representatives

Some young agents committees have company representatives on their board. These committee members may or may not have voting power but can provide important insights into a critical part of the industry. Whether your state includes company reps on volunteer committees or not, leveraging company relationships can play a key role in your overall marketing strategy. Arm company partners that sponsor your program with marketing materials about your program and events— even a small promotional business card can be an affordable way to promote your programs. The partner will see this as a value add to their sponsorship and your materials and messaging will reach agents you may not otherwise be able to reach.

Fundraising

To Dues or Not to Dues

Some states charge young agents a fee to participate in the young agents group; they find that dues encourage a level of commitment from young agents who are more inclined to participate in something in which they have made an Investment. The fee may include admission to key events or simply be a small stipend to get buy-in and help with program administration. Make this dues decision in conjunction with your state association staff.





Helpful Fundraising Tools

- 🚩 Database to track company contacts, touch points and commitment history
- 🚩 Webpage or flyer outlining partner sponsorship opportunities
- 🚩 Talking points and customizable emails the committee can use for outreach.

Fundraising

Depending on your state's company partner sponsorship process, your young agents committee may need to raise funds to supplement expenses for events and education. Before reaching out to company partners, work with your state's company relations staff member to determine Investment levels and sponsorship benefits. When it's time to make "the ask", assign prospective company contacts to members of the YAC who have a relationship with the company or vendor. Once a company has made a commitment, be sure to provide return on Investment updates including brand impressions, number of attendees at events, photos and more. Touch base with companies regularly, including scheduled calls from committee members



Possible Benefits

- 🚩 Complimentary event registration
- 🚩 Logo and link on state association website
- 🚩 Podium mention
- 🚩 Opportunity to provide a speaker or host a webinar

Understand & Attract Young Agents

Build Member Profiles

Big "I" membership is at the agency level, getting contact information for new young agents can be a daunting task, but a clear communication strategy can help. Rely on your state association's Big "I" board and committee members, other active young agents, agency principals and young agents program alumni to provide contact information for young agents in their offices. Depending on the makeup of your state, young agents' information will be entered in the association management system or other database. This inclusion often gives these young agents access to other association benefits like state and national e-newsletters as well as the Big "I" Virtual University and Ask An Expert service. Focus on these selling points when a when soliciting the data.

Over time, a young agents committee can build a meaningful profile of each young agent. Collect the data via an online form agents can complete themselves, over the phone or through agency visits. Helpful information to gather might include: social handles, cell phone numbers for text communication and personal email address. Event and education attendance, volunteer roles and agency visits are also helpful to track. Once the YAC is full-speed ahead, send a quick survey to all young agents to help leadership understand their expectations of the program. Use the results to help form a strategic plan.

Recruiting

- 🔔 Visit agencies to recruit young agents (visits by state staff, volunteers, or company partners)
- 🔔 Use testimonials from current young agents about involvement in association activities and utilize online videos and/or social media to help in the recruitment process
- 🔔 Conduct one joint event with another organization (chamber, association, fraternity, college, etc.), and use the association website for young agent promotion
- 🔔 Promote association membership/ young agent involvement to newly licensed agents
- 🔔 Create targeted messaging for agency principals on the value of young agent activities
- 🔔 Work with carrier reps to promote young agent activities and involvement

Retention

- 🔔 Hold a new member welcome or orientation event (online or in conjunction with other events)
- 🔔 Send a new member welcome email or snail mail packet
- 🔔 Assign committee members/state YAC liaisons to make phone calls welcoming young agents
- 🔔 Assign committee members/state YAC liaisons to make phone calls inviting new young agents to events
- 🔔 Host recurring calls, webinars, virtual education
- 🔔 Recognize new young agents via a listing on your state website, in an article, at an event, etc.

Engagement

- 🔔 Feature young agent profiles in a state or industry magazine
- 🔔 Present a Young Agent of the Year award
- 🔔 Have a young agent booth or host an event in conjunction with a state association event
- 🔔 Offer a mentorship program to new young agents
- 🔔 Ask new young agents to volunteer in committee and/or association activities

Young Agent Activities



Experiences are often the hook that create career-long engagement with the association. Fortunately, associations are the perfect vehicle for experiences—conferences, community service projects and volunteer opportunities enable the YAC to engage other young professionals. The young agents committee can host a networking event, include a young agents community service project or an educational track at your state’s annual conference or get young agents involved in your state’s legislative conference. Some states host young agents conferences while others host regional conferences with other states, and some, like national, host meetings by partnering with other association events. Here are a few ways to start creating experiences for young agents.

Political Involvement

Political involvement is vital to the success and future of our industry. When young agents support legislative efforts, it sends a message to industry leaders and legislators that the independent agency system is here to stay. Each state has an overall InsurPac goal and a specific InsurPac goal for young agents. If you achieve it, your young agents group will receive national recognition.

Nationally

- 🚩 Send young agents to the Big “I” Legislative Conference who are NOT first-timers
- 🚩 Send young agents to the Big “I” Legislative Conference who ARE first-timers

Statewide

- 🚩 Increase young agent participation at state legislative day
- 🚩 Offer a young agent event at your state’s legislative day
- 🚩 Participate in state lobbying efforts
- 🚩 Include a young agent representative on state government affairs committee
- 🚩 Conduct a political awareness seminar/webinar for young agents
- 🚩 Send political communications or action alerts to young agents
- 🚩 Track at least one bill and garner young agent involvement
- 🚩 Run an advocacy piece in your state or young agent publication
- 🚩 Involve young agents in local or regional legislative efforts

InsurPac

- 🚩 Meet or exceed your state’s young agent InsurPac fundraising goals
- 🚩 Increase the number of new InsurPac donors
- 🚩 Increase retention for existing InsurPac donors
- 🚩 Recognize InsurPac donors at your state conference
- 🚩 Designate a young agent PAC chair
- 🚩 Host an InsurPac fundraising event/activity
- 🚩 Create an InsurPac fundraising communication piece
- 🚩 Conduct a first-time lobbying seminar (briefing)

Community Service Projects

A community service project gives young agents a chance to embrace a passion and help their community. These events yield a rewarding experience for young professionals new to the industry, provide topnotch community branding and make a meaningful difference in their communities.

There may be opportunities to garner national association support for a local Make-A-Wish® event. Contact state association leadership or national Trusted Choice® staff for more information at trustedchoice@iiaba.net.



Join the GIVE Movement

Started in 2018, the GIVE movement celebrates hometown acts of service on nationally. The Big “I” Young Agents ask state associations, agents, and companies to give back to the community the first week of June and to share their activity with national by posting on social media using #TCAgentsGive. This is an excellent project for young agent committees to spearhead by host events, drives and fundraisers for charitable organizations important to your community. While the GIVE movement is a weeklong, we want to see what you are doing in the community via the hashtag year-round. We are asking anyone, anywhere to give back—volunteer, host a fundraiser, be a collection site for a local charity. This movement is all about small things making a big difference.

How Do You Get Involved?

Decide on your charity/activity

Use #TCAGENTS GIVE



Finding Champions

- 💡 Create a taskforce that includes both committee members and other young agents
- 💡 Meet with members of the community to determine need
- 💡 Determine and publicize project selection and goal
- 💡 Determine the desired outcome (i.e. number of attendees at an event, amount to be raised for a fundraiser)
- 💡 Create a strategy to manage the project from pre-project planning to post-project wrap-up



Engagement Ideas

- 💡 Invite/involve young agents to participate in the project
- 💡 Invite/involve carriers to participate in the project
- 💡 Invite/involve state association leaders and staff to participate in the project
- 💡 Create community awareness about the project
- 💡 Garner state leader, association member, and association staff support for the project
- 💡 Partner with other organizations to achieve the goals of the project



Success Factors

- 💡 Achieve or exceed attendance goals
- 💡 Achieve or exceed fundraising goals
- 💡 Create awareness of Trusted Choice® independent agents in the community
- 💡 Determine an ongoing community service need and plan to continue the project
- 💡 Create a lasting relationship with the recipient organization

Invest

Invest is a nonprofit education foundation that teaches students about insurance and risk management. Additionally, Invest opens doors by exposing young people to careers in insurance. Once students understand the variety of careers, flexibility and growth potential in the industry, they are more likely to pursue a career in insurance. Invest also offers scholarships to students who want to pursue careers in insurance. With more than 800 programs reaching more than 30,000 students, Invest knows what works and the national staff will help young agents get involved and create a pipeline for future recruits. For more information, contact Invest at info@investprogram.org



Classroom Experience

- 🚩 Help start a new Invest program in an area school
- 🚩 Work with Invest staff liaison to develop or serve on an Invest committee
- 🚩 Participate in at least one high school or college career day
- 🚩 Have at least five volunteers/guest speakers visit Invest classrooms
- 🚩 Use an Invest presentation in the classroom

Student Exposure to the Industry

- 🚩 Host one job shadow event or field trip to an independent agency
- 🚩 Host one job shadow event or field trip to a carrier's office
- 🚩 Host one job shadow event or field trip to your state association headquarters office
- 🚩 Invite Invest students to a YAC conference or other educational opportunity/event
- 🚩 Encourage posting and promotion of internships on Insurance Career Center

Fundraising & Scholarship Awareness

- 🚩 Educate students about Invest Scholarship opportunities
- 🚩 Promote Invest with ads and articles in young agent publications
- 🚩 Promote Invest by placing ads or articles in state association or other industry publications
- 🚩 Host a fundraiser for Invest

Young Agent Meetings & Events

Finding Speakers

If your state already hosts an annual conference, this is an excellent opportunity for the young agents committee to shine. Many young agents committees host an education and networking events track in conjunction with a state conference; some host a standalone event with great success; and others join forces with nearby states to host regional events pooling resources and consolidating efforts. Find what works for your young agents and build programming that will resonate with them. Agency principals may prefer to send their young agents to an event that offers CE or to see a topnotch sales speaker that will increase their bottom line.

Panels or attendee generated content can provide very affordable programming-- often free or a complimentary registration is all it takes. They also allow your young agent community and partners a chance to shine, content and hone their expertise. New agency owners can share the ups and downs of buying or starting an agency. Vendors, service providers may sit down with young agents to talk about how to leverage technology, market better, or find a niche. National has a variety of staff experts also able to present as well. Additionally, timed, themed table discussions can give young agents a chance to connect and ask and answer questions to help them thrive. Look to the Big "I" national Young Agents Committee for sample questions for event discussions or fireside chats.



Some states host regional conferences together. They share workload and expenses all while attracting more young agents—building a larger community.

Event Development

- ★ Create a standalone meeting for young agents, or host a young agents event in conjunction with a state conference
- ★ Raise funds for the event via company and/or vendor support and invite state leaders to participate in/speak at the event
- ★ Plan at least one networking event/ mixer with members, young agents, and sponsors
- ★ Develop a schedule that offers valuable takeaways for agents to implement in their agencies

Marketing

- ★ Develop an attendee prospect list, and create custom marketing messages
- ★ Target marketing to agency principals, offer scholarships, or a reduced rate strategy to secure registrants
- ★ Utilize state association outlets to promote the event, and utilize presenter content/blogs/webinars to promote the event
- ★ Call prospects and agency principals to promote the event and provide sponsor and state association staff with field rep materials to help market the session

Success Measures

- ★ Met/exceeded fundraising and attendance goals, and mentored first-time attendees and adhered to the event budget
- ★ Recognized sponsors/state leadership where appropriate and communicated ROI to sponsors
- ★ Provided meaningful post-event deliverables/takeaways

Communications



Communications Best Practices

A well-rounded communications strategy should start as soon as you collect a young agent's contact information and is imperative to your program's success. Direct email, e-newsletters, websites, blogs, social media, Zoom networking sessions and text messaging are all great tools to share your message. And, if the budget allows, don't discount the power of snail mail or small seasonal or event themed gifts for event attendees. See if there is an opportunity to contribute a column or updates to state publications. Encourage your young agents to tell their story, and pitch their perspective to your state communications, Independent Agent magazine and industry trade press. Social media groups can keep your group connect and sharing expertise.



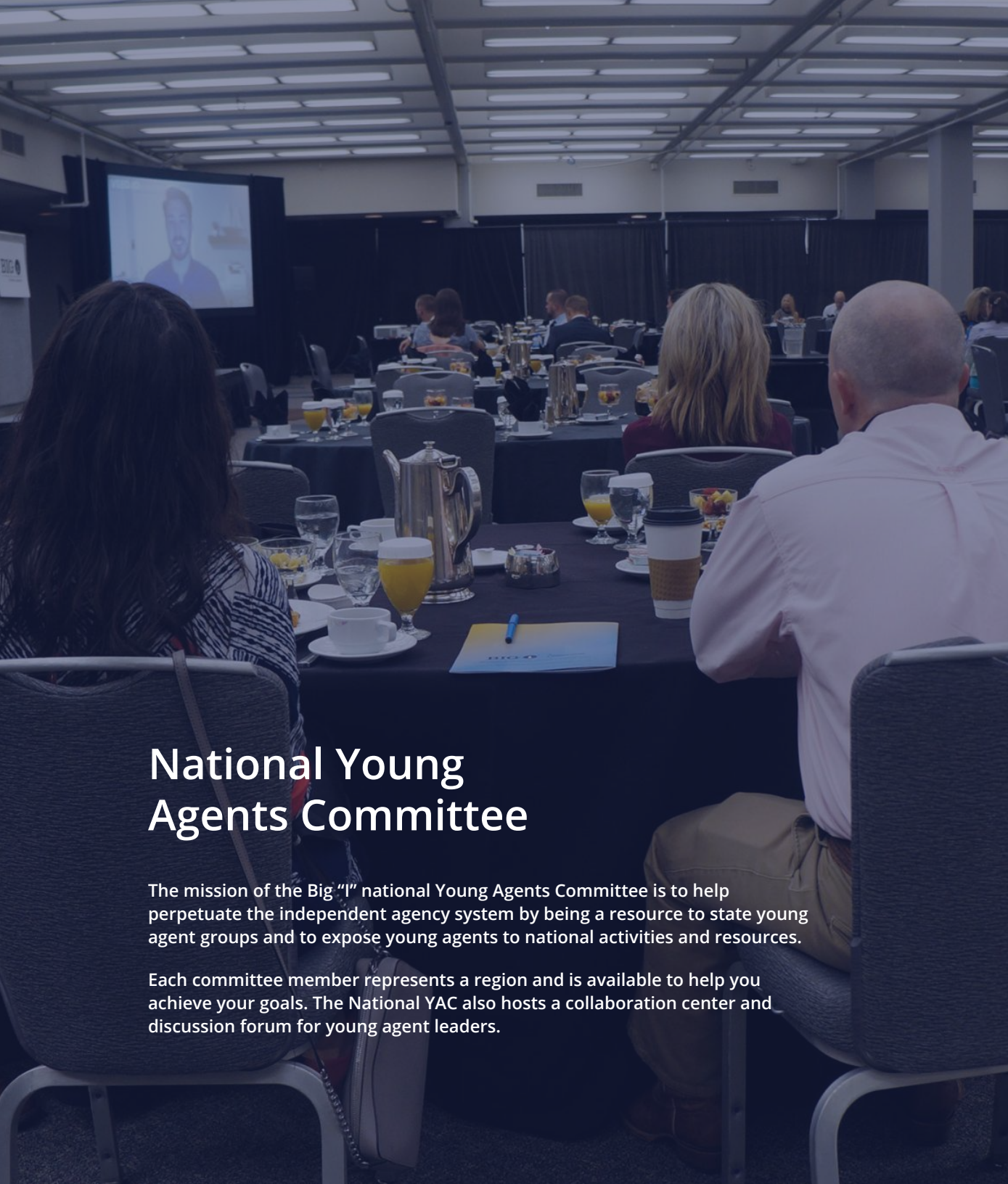
Strategy

- ★ Use a consistent logo and tone for young agent content
- ★ Work with the state association communication team
- ★ Create an editorial plan or schedule
- ★ Manage the young agent database
- ★ Create social media spaces and content for young agents to connect
- ★ Consider crowd sourcing social media offering takeovers
- ★ Monitor your social media and email analytics to help make content decisions
- ★ Leverage committee members

Outreach

- ★ Email updates when necessary and monitor what's getting the most opens and reads
- ★ Schedule regular video calls to give updates, discuss important topics or bring on subject matter experts to present
- ★ Encourage and celebrate the social media activity of your members, like, follow, comment, love.

Resources



National Young Agents Committee

The mission of the Big "I" national Young Agents Committee is to help perpetuate the independent agency system by being a resource to state young agent groups and to expose young agents to national activities and resources.

Each committee member represents a region and is available to help you achieve your goals. The National YAC also hosts a collaboration center and discussion forum for young agent leaders.

Big "I" Young Agents Leadership Institute

Each year, the national YAC provides an opportunity for state young agents committee leaders to gather as one group. The event happens every fall in conjunction with the Big "I" Fall Leadership Conference. Programming includes a roundtable event for chairs and liaisons to share strategies for young agent program success. The line-up provides one-of-a-kind leadership skills, timely panel discussions and other success strategies.

Big "I" Legislative Conference

The national YAC provides up to \$25,000 in scholarships each year to first-time young agent attendees of the Big "I" Legislative Conference. The annual event takes place in Washington, D.C. each spring and includes an issues briefing, updates from top legislators and visits with legislative offices.

Celebrate EXCELLENCE

www.independentagent.com/youngagents

