



2024 Accomplishments and 2025 Plans

Chris Cline, Executive Director and Ginny Winkworth, Program Manager

The Agents Council for Technology (ACT), a program of the Big "I", enables the industry's technology conversations. This forum of agents, brokers, technology providers, carriers, and other industry groups conducts research, provides collaborative recommendations, and creates resources to help independent agents make strategic decisions about the use of technology in their agencies. Through work groups, webinars, conferences, presentations, panels, and more, ACT partners come together to share insights and create industry-wide education for all Big "I" agents.

<https://www.independentagent.com/ACT>

FY25 Committee Members

Tom Chamberlin, MT (Chair)	Jay Taylor, SC
Shannon Churchill, IL	Michael Vance, AL
Angela Ford, TX	Matt Wood, UT
Angela Ripley, MD (Executive Committee Liaison)	

Highlights from ACT's 2024 Accomplishments

2024 was an exciting year for ACT as we celebrated our 25th anniversary of helping agents and the industry understand and leverage technology while also spending a great deal of time working with stakeholders on our strategic refresh. This unique combination of priorities, coupled with executing numerous existing ACT initiatives created wonderful opportunities to reflect, revisit, and revitalize our focus. We're proud of our accomplishments and impacts from our work in and around the industry and in collaboration with so many amazing partner companies. We are equally excited to continue our evolution to help an ever-changing industry!

Key Activities and Accomplishments from 2024:

- **ACT 25th Anniversary campaign** for the year that includes: a special version of the logo, a [fully produced video](#) with **Jeff Yates, Ron Berg, and Chris Cline** (filmed 3/7/24) that was released in [long form](#), a short version at the Leg Conference, and with 25 highlights posted to all social channels through the last half of the year.
- Officially launched a body of work to **assess ACT's focus and approach for the future**. This evolved into a strategic program review initiative that has occupied a large portion of our time but also served to shape ACT's work through the year in preparation for 2025 and beyond.
- **Partner Engagement:**

- o Doubled our [Partner Webinar series](#) (20-episode goal) to feature partners in their areas of expertise and in alignment with member needs. The content and approach in featuring partners more prominently aligns with the strategic refresh work.
- o Built and introduced a new [IMPACT Partner Video Series](#) – short 30-120 second videos featuring partners and members with quick reactions to a question we pose. They'll be promoted on all social and inventoried on our website.
- o [ACT News](#) grows as a mechanism to feature partners and their thought leadership in support of our members' needs and ACT's future.
- o Continuing our **Partner Thank You and Recognition** campaign on social media.
- o [“Proud Supporter” initiative](#) for ACT supporting members, providing a way for members to show their support of the IA industry with “Proud Supporter” badge.
- o Offered to **meet with all ACT Partners to align 2024 contact plans**
- o Introduced **new partner pricing** with first increase in 5 years.
- o **Added new members:** totaling 4 new for the year.
- o Began **offering our industry insight to partners for their strategic work** in the way of lunch and learns, targeted topic meetings, webinars, and in-person presentations. This initiative is growing and is, thus far, well received as a means to share a broader combination of industry insights and offering advocacy for agency membership at large.
- **Industry Involvement**
 - o ACT executive director continues to get asked to **speak at numerous industry events** as a keynote, panelist, and panel moderator on an array of topics from Artificial Intelligence, Strategy, Choosing Technology, Culture, etc. Additionally, our executive director is a frequent guest on **industry podcasts/webinars**, is **interviewed by other industry groups**, and an author of several **industry blogs**.
 - o **Ivan's Connect Session - “Letter to the Industry” event.** We hosted a multi-topic roundtable event as part of Ivan's Connect. This well-attended and highly collaborative session served to generate input from each of our major stakeholder groups as a concept test for our future pillars, but to also drive a more unified message across the topics: Data, Connectivity, Artificial Intelligence, and Culture.
 - o **ITC Agents.** ACT collaborates with Insurtech Connect to drive member agency attendance to their first ever ITC Agents event. This foundational work aligns with our future vision of partnering with like-minded organizations to bring the agency voice to places where innovation and education are happening. Chris Cline was added to their advisory council.
 - o [101 Weston Labs](#) and [Catalyit](#). The Big 'I' has continued collaboration with these two organizations in an effort to bring even more resources to our members. We anticipate even greater opportunities for partnership in the future.
- **Marketing and Social Media**
 - o Built and executing a full social media strategy that leverages internal content, partner thought leadership and collateral, and other member-relevant content, events, and insights as appropriate. Over the last 2 years, we have tripled our followers and continue to drive engagement and activities back to our website assets and partners.
- **Work Groups**
 - o 2024 was a slower than anticipated year for our work groups as our future strategy work occupied more of our capacity. We believe, however, that the investment this year will pay off in 2025 and beyond as we **envisioned our [work group model](#)** to focus on getting the right people in the room for each topic, create greater clarity around expectations, and begin thinking more proactively about productizing output from the groups.
 - o Completed our Cyber Guide Refresh in collaboration with the Security Issues work group.

- o Completed a Disaster Planning Guide overhaul with the support of work group members from each of our work groups.
- Collaborated with Big I legal team to draft and publish an **Artificial Intelligence Guide and Staff Policy Template for Big I member agencies**.
- **Built ACT revenue and retention tracking mechanism** with a similar concept to an agency or carrier production record to better track expected revenue, begin tracking retention trends, and assess current financial value of ACT at a given time.

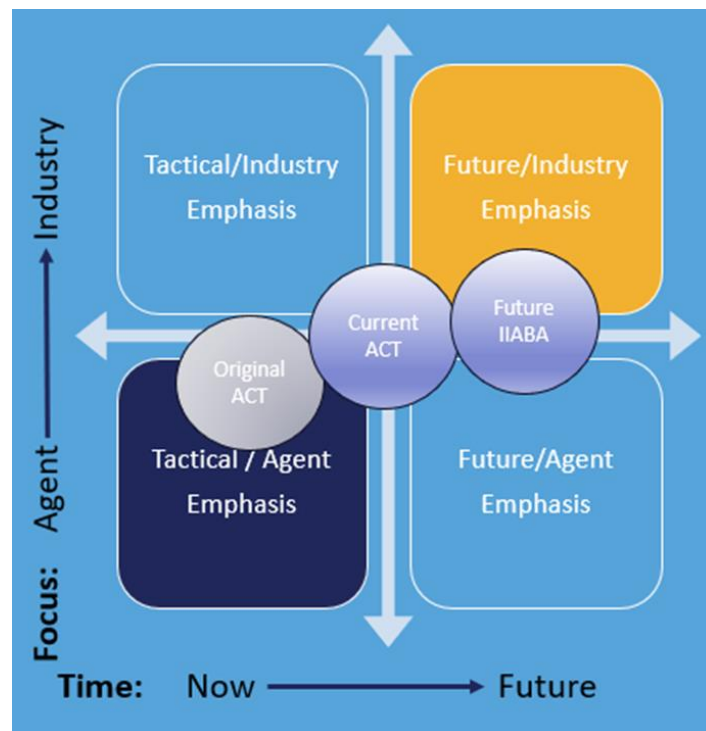
ACT's 2025 Plans

As we move into 2025, ACT will add greater emphasis to implementing the evolution of our focus and approach. Though there are a number of behind-the-scenes aspects to any strategy work, as well as a need to remain open to feedback and iterate along the way, the following represents how we'll dive into the new year to bring value to member agencies, our partner companies, and the industry at large.

Recognizing that our traditional focus was no longer as effective due to the rapid pace of change and increased diversity across agencies, ACT will evolve our work.

- Shift to more of an **industry-level member advocacy focus**, as illustrated in the graphic below.
 - o Allows ACT to **collaborate and influence tech design and adoption**.
 - o Better identify, understand, and educate member agencies about **emergent trends**, why they matter, and what risk and opportunities each represents.
 - o Will change the topics we focus on and the granularity in which we discuss each.
 - o Ideally this approach **gives Big "I" members a voice** in tech innovation and opportunity for partners to better understand IA perspective.
- Strategically **leverage partner companies as experts** for our members through workgroups and other content.
 - o ACT partners are excellently equipped to be the technical experts in each area of ACT focus and we'll partner with them in a variety of ways to bring this knowledge to our members.
 - o **Proactively showcasing our partners** brings greater value to them as they invest in the ongoing viability of the independent agency channel.
- **New Work Group Model** will bring renewed energy to collaborating with our stakeholders
 - o **Three new groups** will be rolled out in 2024, each in alignment with the pillars explored at our "Letter to the Industry" event: **Data, Connectivity, AI**. And each will incorporate people and culture as a requisite.
 - o New group descriptions, participant expectations, and interest forms will be sent to stakeholders with the goal of establishing new teams focused on specific topics.
 - o We aim to better and **more quickly productize** the amazing conversations and collaboration of each work group. Defining outcomes and approach will be an early goal for each.
- **Establish industry partnerships** for direct member benefits as we recognize we can accomplish much more by collaborating with like-minded organizations.
 - o Build upon the **partnership with ITC Agents** to create greater awareness and involvement of agencies and supporting partners at one of the largest insurance technology events in the country.
 - o At the time of publishing this update, we are **nearing completion of another large-scale partnership** that aligns with our goals of educating agencies about emergent technologies and giving them a seat at the table to discuss them.
 - o Continue our efforts to collaborate and **align with the 101 Weston Labs and Catalyt** teams.

- **Identify other industry resources**, assess the opportunities to collaborate, and create clarity for members and partners about where and how they can continue to learn and be involved in industry technology conversations.
- We'll **continue creating and publishing meaningful and relevant content** via partner webinars, IMPACT videos, ACT News, blogs/vlogs, social media and other avenues.
- **Engage our technology providers and carriers** that are interested in partnering with ACT and investing in the long-term health and viability of the independent agency industry and work to find new partners that share similar goals.
- We'll continue **participating in relevant industry events** to attend and present at whether **keynoting, participating in panels, moderating roundtables/panels, or joining other strategic conversations** that align with our goals of educating, leading thought, and advocating for member agencies.
- **The Great Unknown** – These are unprecedented times, and we are experiencing rapid change. This is a placeholder and catchall for opportunities that may emerge through the year. ACT will do our best to remain positioned to maximize these possibilities and even make trade-offs if necessary.



Thank You to All of [Our Partners](#).
We Cannot Do This Without Your Support -
Here's to an Amazing 2025!