



Agents Council for Technology Schedule & Agenda

February 12-13, 2014

Embassy Suites Phoenix—Scottsdale, Arizona

Dress: business casual for all sessions

Pick up badges outside meeting room

Schedule of Meetings & Events

All meetings and meals listed below will be held in Painted Mountain Ballroom A&B, except for the Embassy Suites breakfasts and receptions.

Wednesday, February 12

- 12:00—1:00 PM ACT Lunch
- 1:00—5:15 PM ACT Meeting
- 5:30—7:00 PM Embassy Suites Reception – (hors d'oeuvres served; dinner on own)

Thursday, February 13

- 7:00—8:00 AM Embassy Suites Breakfast
- 8:00—12:00 PM ACT Meeting
- 12:00—1:15 PM Bright Ideas luncheon
- 1:30—5:00 PM AIMS Society & AUGIE Joint session
- 5:30—7:00 PM Embassy Suites Reception
- 7:00—10:00 PM ACT, AUGIE & AIMS Society Joint Dinner & entertainment

Friday, February 14

- 7:00—8:00 AM Embassy Suites Breakfast
- 8:00—12:30 PM AUGIE Meeting
- 12:30 PM Box Lunch
- 1:00—6:00 PM Golf Tournament (*fee*)
- 7:30 PM Optional Off-Site Dinner (*fee*)

ACT Agenda

Wednesday, Feb 12 (1:00—5:15 PM)

1. Chair's Welcome & Antitrust Statement
(1:00-1:10 PM)
Jim Armitage (Arroyo Insurance) & Jeff Yates
2. IIABA CEO Keynote – *Today's Marketplace for Independent Agents & Brokers – Opportunities & Challenges*
(1:10-1:50 PM)
Bob Rusbult, IIABA President & CEO
3. Customer Experience Work Group Overview
(1:50-2:15 PM)
Co-Chairs: Judy DeLaRosa (Chubb) & Claudia McClain (McClain Insurance Services)
Why the work group was formed and a review of our game plan
4. Outside Perspective on Customer Journey Mapping
(2:15-2:50 PM)
Bryan Surface (Touchpoint Dashboard)
The benefits of mapping the customer experience and some considerations to follow when doing so

Break (2:50-3:05 PM)

5. Customer Experience Subgroups
(3:05-3:35 PM)
Nick Oldfield (Cincinnati Insurance) – Commercial Lines
Karyn Furstman & Cynthia Lait (Safeco) – Personal Lines
Discussion of initial work of commercial lines and personal lines subgroups
6. Customer Experience Breakout sessions
(3:35-4:45 PM)
7. Reports from the Breakouts & Session Takeaways
(4:45-5:00 PM)
Jim Armitage & full group
8. Next Steps for the Work Group
(5:00-5:15 PM)
Ron Berg

Thursday, February 13 (8:00 AM—12:00 PM)

9. ACT Executive Director Perspectives
(8:00-8:30 AM)
(a) Jeff Yates – *Reflecting on the last 12 years and thoughts for the future*
(b) Ron Berg – *Incoming thoughts on opportunities and focus areas*
10. TrustedChoice.com & Project CAP Plans for 2014
(8:30-9:15 AM)

Chip Bacciocco (CEO), Marty Agather & Vinnie Savarese, Project CAP

11. Real-Time/Download Campaign Report

(9:15-9:45 AM)

Joyce Sigler (Jones & Wenner), Co-Chair

Break *(9:45—10:00 AM)*

12. Industry Implementation Open Forum

(10:00—11:05 AM)

Ron Berg & Jeff Yates, facilitators

This is the opportunity for agents, carriers and vendors to discuss the key issues they are facing with their implementations, as well as their key successes, and to get input from the group. Potential issues for discussion:

- Activity Notes
- Claims Download
- Electronic Policy Delivery
- Real-Time Commercial Lines Rating
- Commercial Lines Download
- Electronic Signature
- Single Sign-on & streamlined password handling
- Other real-time implementations
- Best Practices to drive implementation
- Communicating industry priorities and getting buy-in within our organizations
- Other?

13. New ACT Work Groups

- Agency Technology Agreements Work Group

Jim Armitage, Chair

(11:05-11:20 AM)

- ACT Communications Work Group

Paul Peebles (Florida Association of Insurance Agents), Chair

(11:20-11:45 AM)

14. Summing Up and Meeting Takeaways

(11:45 AM-12:00 PM)

Jim Armitage & full group

15. Times & Places for Next Meetings

- May 5, 2014 ACT Meeting (afternoon) in conjunction with the May 4-6 ACORD LOMA Conference, Rosen Shingle Creek, Orlando, FL
- October 27, 2014 ACT Meeting (afternoon) in conjunction with the ACORD Implementation Forum, Marriott Harbor Beach Resort, Fort Lauderdale, FL