

Agenda

TUESDAY, SEPTEMBER 17

MAIN STAGE

INSURANCE DISTRIBUTION - THE FUTURE HAS ARRIVED

Matt Masiello, Chief Executive Officer, SIAA

Time: 12:00-1:00 pm EDT

The digital revolution has changed the way many people think about purchasing insurance. The internet and multiple distribution channels offer the consumer more choices, yet also create more chaos. Independent agents still offer clients what others do not— advice, breadth of product offering, and carrier choice. Yet, today's clients want a quality experience on their terms. Becoming a client-centric insurance agency, consistently delivering on your brand promise, and understanding your value proposition are more important than ever. The independent agencies who discover powerful opportunities in adopting new technologies while embracing their traditional competitive advantage as a trusted advisor will redefine the independent agent.

EMBRACING DIGITAL TO ENHANCE THE CLIENT EXPERIENCE

SIAA Member Panel Discussion

Panelists:

Christine and Mark Bailey, Bailey Family Insurance Agency, Springfield, IL

Steve Griswold, Griswold & Griswold, Torrance, CA

Chris McCarthy, The Insurance Outlet, Laconia, NH

Mark Rodgers, Trailstone Insurance Group, Littleton, CO

Moderator: Jeff Holmes, Chief Operating Officer, SIAA

Time: 1:30-2:30 pm EDT

We all hear that agencies must be transitioning to be more "digital", but what does that mean? The process of discovering, evaluating and adopting technology solutions looks different across agencies. Join this panel of agency principals as they share their unique insights – challenges and successes – in leveraging digital innovation to grow and compete.

TRANSFORMING OUR INDUSTRY TOGETHER

Tyler Asher, President, Independent Agent Distribution, Liberty Mutual Business Lines and Safeco Insurance

Time: 3:00-4:00 pm EDT

There is no doubt, customer expectations are driving carriers and independent agents to up their game in everything from products that protect to texting that connects. If agents want to thrive in a digital-first world, it requires a shift in mindset. Tyler Asher will deliver a rousing talk on transforming our industry together. He will look into the trends that affect our industry and dig into what successful agents are doing today to become agents for the future.

WORKSHOPS

BECOME AN AGENT FOR THE FUTURE

Stacie Cooper, Project Manager & Marketing Coach, Safeco Insurance & Liberty Mutual

Location: Apollo

Time: 11:30 am-12:15 pm EDT

There is an enduring value of an independent agency. No other channel offers consumers the combination of ease, choice and advice they need to make smart decisions. However, the insurance industry is rapidly changing. Millennials are now the largest adult generation - and they value what IAs offer more than any other generation! But they want access to what you offer in a variety of ways, especially digitally. As technology evolves and customers' needs shift, IAs must adapt to ensure long-term growth and success.

Conference Track: Marketing, Service

BUILDING THE MODERN AGENCY

Clinton Houck, Director of Agency Development, Advisor Evolved

Location: Voyager

Time: 11:45 am-12:30 pm EDT

In today's marketplace 80% of consumers shop and research a product online during the buying process. The number 1 most common search term on Google is "product or service near me". Without a strong local SEO presence and clear Call to Action driven website, agency owners are missing out on a majority of opportunities to grow their book of business. During this presentation you will learn how to rank locally on Google, to attract visitors, and the three core components of your website to convert visitors to leads.

Conference Track: Marketing

BOLD, NEW STRATEGIES

Ilya Bodner, Founder & CEO, Bold Penguin

Location: Apollo

Time: 12:30-1:15 pm EDT

To solve for the issues of the small commercial space, you need three solutions for the three main issues. Only focusing on the front or back-end won't get the job done. It requires carefully stitching solutions across the whole landscape. Discover the actual role of the distribution channel with agents and brokers, the role of a carrier, finding where re-insurers and MGAs fit in, and discuss how technology providers are able to help or hurt the interaction.

Conference Track: Operations

LINKEDIN FOR INSURANCE PRODUCERS / 3 PILLARS (PROFILE, SEARCH, SHARING)

Jeff Teschke, Founder and CEO, Forge3, Ltd.

Location: Voyager

Time: 12:45-1:30 pm EDT

90% of insurance producers I meet aren't using LinkedIn. There's your opportunity! LinkedIn is such a powerful prospecting and sales tool. There's more to it than accepting connection requests. A lot more. Join Jeff Teschke,

Founder and CEO of Forge3, for this updated, fast-paced screen share and live video training session. He'll cover the 3 Pillars of LinkedIn, including profile, search and sharing. Do something different this year. Be better. Do more. Inspire your colleagues.

Conference Track: Marketing, Advisory

DRIVING OPERATIONAL EFFICIENCY FOR YOUR AGENCY

Tim Robinson, Chief Operating Officer, Agency Revolution

Location: Apollo

Time: 1:30-2:15 pm EDT

Whether you are a new agency owner establishing a start-up or have been around for several years, like many small business owners, do you find yourself spending most of your time managing day-to-day operations? With the right automation tools in place, even the smallest independent agencies can be competitive in today's digital landscape. Beginning with a modern website, followed by marketing tools integrated with your agency management system, deliver consistent marketing campaigns that generate business while you focus on sales and service.

Conference Track: Marketing, Operations

WHY DIGITAL AGENCIES OUTPERFORM THEIR PEERS!

Brady Polansky, Vice President of Agency Relationships, EZ Lynx

Location: Apollo

Time: 2:30-3:15 pm EDT

Becoming a more modern agency starts with better understanding of your agency's customer journey. Follow along the three major customer journeys, the most common digital technologies influencing them, and the resulting benefits. Next, by focusing on a few simple, yet often overlooked key performance indicators (KPIs) begin to outline the various steps that will allow technology to drive meaningful improvements.

Conference Track: Marketing, Operations, Service, Advisory

INTRODUCING THE SIAA SMALL BUSINESS SUBMISSION PLATFORM

(SIAA MEMBER-ONLY SESSION / TENTATIVE)

Speaker TBD

Location: Voyager

Time: 2:45-3:30 pm EDT

SIAA is preparing to roll out industry-leading technology, enabling SIAA members to submit their small commercial business to top carriers with one application. Learn more about this technology, its benefits to your agency and what you can expect.

Conference Track: Operations

NET PROMOTER SCORE (NPS) - WHAT, WHY AND HOW FOR THE INSURANCE INDUSTRY

Matthew Smith, Business Development, Rocket Referrals

Location: Apollo

Time: 3:30-4:15 pm EDT

Just five years ago, the Net Promoter Score (NPS) was mostly unknown to insurance agents. Since then the NPS has become the standard for measuring client loyalty and improving the client experience—meaning

higher retention and more referrals. In this session we will provide an overview of the NPS and show you exactly how agents are using the NPS to grow their agency.

Conference Track: Advisory

HIGH TECH, HIGH TOUCH: INTEGRATING TECHNOLOGY TO ENHANCE CLIENT COMMUNICATION AND EXPERIENCE

John Fear, Founder, Premier Business Consulting

Location: Voyager

Time: 3:45-4:30 pm EDT

Successful businesses all have at least one thing in common – they use all available tools to maximize relevant communication with their clients to improve their experience. With your agency management system as the foundation, your business should coordinate all available tools to improve communication with current clients and increase efficiency acquiring new clients. Understanding what your clients believe is “differentiated service” and then aligning your agency’s tools and staff’s talent to meet those needs, is critical to your business’ sustained growth. This session will also include methods for both soliciting external feedback from clients to be measured using internal performance elements to ensure that you’re “measuring what you’re managing”.

Conference Track: Marketing, Service, Operations

SCHEDULED CHAT

HOW INSURTECH IS HELPING AGENTS GET MORE PERSONAL

Jason Keck, Chief Executive Officer, Broker Buddha

Time: 12:15-12:45 pm EDT

Agents today are more receptive than ever to technology that can help make their lives, and their clients’ lives, easier. The best insurtech products out there are valuable because they've managed to simplify time-consuming processes. Jason Keck, CEO and founder of Broker Buddha, will share insights on how brokers can make technology work for them, so they can spend more time on relationships and less time on paperwork.

Conference Track: Marketing, Operations

YOUR PERMISSION SLIP TO THE NEXT BIG THING | THREE DIGITAL PILLARS

Chris Eldridge, Director of Operations, Cloudbridge Solutions

Time: 1:15-1:45 pm EDT

Chris from Cloudbridge Solutions will cover three digital pillars, that can be used to help you grow and thrive in the digital age. Discuss best practices around establishing your agency online, to grow your chances at getting new leads and efficient ways to close more business by connecting with customers at the perfect time.

Conference Track: Marketing, Advisory, Service

ESTABLISHING A SOUND MOBILE STRATEGY

Matt Aaron, Co-Founder, Insurance Agent App

Time: 2:15-2:45 pm EDT

A good mobile strategy benefits policyholders, prospects, your team and your carriers. Problem is... Most benefit only one of the 3. Learn what makes a mobile strategy effective for all stakeholders.

Conference Track: Advisory

ASK SIAA C-TEAM - VIRTUAL CONFERENCE FEEDBACK

Matt Masiello, Chief Executive Officer, SIAA

Jeff Holmes, Chief Operating Officer, SIAA

Doug Coombs, Chief Marketing Officer, SIAA

Time: 4:00-4:30 pm EDT

Before you leave the conference, join the SIAA C-team to ask for their perspective on the industry, the IA channel, and where SIAA fits with the Insurance Agency of the Future. The team will also use this time to discuss the virtual conference with attendees.

CONFERENCE TRACKS

MARKETING: Developing a digital presence & online strategy (website, digital marketing, social media etc)

ADVISORY: Client advisory & sales (engaging clients on their terms)

SERVICE: Servicing Your clients (self-service, service centers, agency management systems)

OPERATIONS: Finding agency efficiencies through automation (agency management systems, rating, submission, back-office tech)