



Carrier Session and AUGIE Meeting

Tampa, Florida
February 4, 2010

Who should attend?

Decision makers from carriers that want to find out what their companies need to be doing to make more sales and be recognized for quality service.

What will happen at this event?

- Agents will share their stories on how they're succeeding with companies that are easy to do business with.
- Carriers will share their stories on what they need to do to become recognized as a company easy to do business with.
- Vendors will share high level summaries of how they will help you succeed at becoming recognized as a carrier that is easy to do business with.

When?

Thursday, February 4th from 9:00 AM through dinner

Where?

Embassy Suites Tampa
Downtown Convention Center
513 South Florida Avenue
Tampa, Florida, USA 33602
Tel: +1-813-769-8300

Why should you attend?

- Learn how to drive out costs and pain points. Ease of doing business is often the deciding factor in placing an account with a particular company. If the company is priced in a competitive range and the coverage is similar ease of doing business with that company will prompt the CSR, Placer or Agent to put the risk with the carrier that makes it easy to do business and who's systems connect most effectively with the agency systems.
- Hear directly from agents what their technology needs are. Even if the have our own technology council, the agents that attend these meetings are representative of the most tech savvy and efficient agencies.
- Get the information your IT development teams need to help set priorities.

*Coverage of June 2009 Event in Atlantic City, NJ
"Regional insurers, wholesalers get VIP treatment at
ACORD's Atlantic City technology briefing" By Ellen D. Kiehl,
Ph.D., Sr. Research Analyst, PIACT, PIANH, PIANJ, PIANY*

"Why not enter information one time—after that, the data flows seamlessly from submission through claims?" That's the vision laid out for regional carriers, wholesalers and their agency partners at the recent Regional Carrier Session sponsored by ACORD, AUGIE and the Real Time Campaign. The session was held in conjunction with the joint annual conference of PIANJ and PIANY. About 100 people, including representatives of 29 insurance companies, took part in the all-day program June 9, 2009 in Atlantic City. Here's some of what they heard.

Executive Summary

Carriers and wholesalers seeking technology solutions have more resources and support than ever before. They don't have to go it alone. ACORD's efforts will integrate insurance data and systems across the entire industry, all across the globe. Carriers can find the information they need through ACORD, if they want to improve their agent interface and/or internal system integration. Agents' use of Real Time transactions and rating has reached the "tipping point" where there is no going back. Companies that aren't on the "spreadsheet" risk being overlooked. ACORD offers people many opportunities to get involved in their own personal interest areas, through its project-oriented Work Groups. Kicking off the session was ACORD's senior vice president John Kellington, who laid out ACORD's breathtakingly simple vision statement: **Enter the data one time!**

ACORD's current emphasis on technology standards just continues its historical mission: improved workflows and less cost for all parties involved. From a business standpoint, producers can spend more time selling, less time processing. From an industry standpoint, ACORD provides a tremendous resource through its knowledge base and networking opportunities.



DRAFT - Carrier Session and AUGIE Meeting

Tampa, FL

February 4, 2010

Nothing happens unless the sale is made! The industry goal is to ensure that independent agents have more time for service, retention and sales. **This session is designed for insurance carriers** that want to know why they should be providing real time and download functionality and how they will make it happen!

Below is a draft of our program. Please register for this event by going to <https://www.iiaba.net/cbsupx/education/evtregistration.aspx?evt=8237>

Agenda

<u>Start time</u>	<u>End Time</u>	<u>Speaker</u>	<u>Topic</u>
9:00 AM	9:20 AM	John Kellington, SR VP - ACORD	Welcome from ACORD
9:20 AM	9:40 AM	Michael Miller, COO - Brightway Insurance	Hear from a Florida agent on why it's important for carriers to support independent agency efficiency and ease of doing business. Hear why it is necessary for our future competitive position, how it is accomplished and some of the obstacles that need to be overcome to succeed.
9:40 AM	10:20 AM	Donna Barr Virginia Vaughn	Hear from a panel of Florida agencies that are realizing the benefits of real time and download technology. Hear from these principals about how real time and download tools have enhanced their business.
10:20 AM	10:50 AM		Break
10:50 AM	11:30 AM	Malta Collins - Cincinnati Gary Lawrence - Allied	Hear from carriers that are doing real time and download. Hear how ACORD Standards play a role in their implementations, and the results they are seeing because they provide this technology. Ask the panelist questions about what they learned along the way.
11:30 AM	12:30 PM	Moderator – Cal Durland - ACORD	Participate in an interactive discussion on what's needed in Florida to ensure that ease of doing business is accomplished. This discussion will include ACORD / real time / standards and Advanced Implementation Issues.

Start time	End Time	Speaker	Topic
12:30 PM	1:30 PM	Lunch Speaker - Kitty Ambers	Take some time to enjoy your lunch and network with other attendees. Hear: <ul style="list-style-type: none"> • How Real Time Makes \$\$\$ • Learn about ACORD's ACE (ACORD Certified Expert) program
1:30 PM	2:15 PM	Vendors: <ul style="list-style-type: none"> • Doug Johnston - Applied Systems • Jeff Larson - Ebix • David Victor - QQ Solutions • Nellie Massoni - Vertafore 	Hear from the agency management system vendors that provide the agents with systems that contain real time and download technology. Take the opportunity to hear from the vendors and ask them questions that will help you to succeed.
2:15 PM	3:00 PM	Raters and Builders of components: <ul style="list-style-type: none"> • Mason Power - AgencyPort • Janice Sheffield - CSC • Jeff Larson - Ebix (Ebix eForms Viewer along with our eRater) • Shannon Maher - IVANS • Bala Kumar - Jarus Technologies • Rex Fledderjohn - NxTech, Inc. • Dave Acker - Vertafore 	Hear from raters/builders of solutions that will help your company provide real time and download tools you're your agency force. Then you make the decision if your company will be buying or building the solutions.
3:00 PM	3:30 PM	Break	Transition from Carrier session to AUGIE Meeting
3:30	5:30	AUGIE Meeting	<u>AUGIE Agenda</u> <ul style="list-style-type: none"> • Commercial Lines Download update and discussion • ACORD and AUGIE • Launch of the AUGIE Survey • Other AUGIE Business
5:30	?	Reception and Dinner	Please join us for the reception and dinner following the event

Embassy Suites Tampa - Downtown Convention Center

[Click Here to make your hotel reservation.](#)

To book your room by phone, call the hotel directly (preferred) at 813-769-8300 or, to call toll free, you can reach the Embassy Suites' central reservations office at 1-800-EMBASSY (362-2779). The AUGIE/ACORD room block is sold-out. There are still rooms available outside the room block.

Dress Code: Business Casual

This event is being in conjunction with:

AUGIE/ACT meetings

AUGIE - the afternoon of February 4th. The agenda for these events may be secured by contacting Cal Durland, CPCU cdurland@acord.org

The ACT (Agents Council for Technology) meeting will be Feb 5, 2010 - 8:00 AM—2:00 PM. The agenda for these events may be secured by contacting Jeff Yates Jeff.Yates@iiaba.org

CSC's Coastal Property, Executive Innovation Seminar -

Wednesday (12:00pm - 5:00pm), February 3, 2010 • Embassy Suites, Tampa, Florida This will be an intimate gathering of P&C industry executives focused on coastal property business. You will participate in a, boardroom-style discussion with industry experts and peers, including topics such as: reinsurance 2010, risk evaluation and modeling, growth and business retention, business continuity, ease of doing business with agents, and the flood insurance program.

Participant space will be limited and reserved primarily for insurers writing property in Florida and other coastal states.

Interested in attending, contact Jolanda Hardy jhardy8@csc.com or 803.333.3788 for agenda and registration.