

## BIG "I" AGENTS COUNCIL FOR TECHNOLOGY.

# PARTNERSHIP OVERVIEW

### WHAT IS ACT?

The Agents Council for Technology. We are an industry leader in helping our independent agencies and carriers implement innovative technologies and workflows faster and more consistently.

### HOW DO WE OPERATE?

Our mission is to bring all independent agent & broker distribution stakeholders together to advance the use of the most effective agency workflow technologies which enhance productivity, sales & marketing, service, and security. By using work groups and in-person, as well as virtual meetings we develop practical information, best practices, webinars and tools to assist agencies, brokerages, carriers and vendors in implementing more effective processes and technologies.

### WHAT ARE WE WORKING ON?

**Security Issues Work Group:** In 2020, this group produced the updated [Agency Cyber Guide 3.0](#), a more intuitive online resource, with real-world IA breach examples, and more robust resources to address regulations from entities like Gramm-Leach-Bliley, NY DFS, and the NAIC. For 2021, they plan to address industry cyber advocacy, using this guide, by coordinating carriers, agents, and Big 'I' state associations partners to address the complexity surrounding third-party provider regulations. The group will also create a Remote Work Security Pocket Guide and update the Agency-Carrier Technology Agreements to include emerging third-party provider regulations and other evolving tech aspects.

**Disaster Planning Work Group:** Updated the ACT '[Agency Disaster Plan](#)', providing agents with a comprehensive resource on all contingency planning areas for uninterrupted business sales and servicing during disasters, and now pandemics.

**Customer Experience (CX) Work Group:** Continued updates of their one-of-a-kind online [Customer Experience Journey](#) 'roadmap' for independent agents and their carriers to deliver an outstanding digital customer experience, including development of an on-line, self-assessment for agents to identify opportunities to increase ease of doing business for consumers and customers. An '[Agents Resource Guide To Chatbots](#)' was released providing agents with education and insights to implement Chatbot interfaces.

**API Work Group:** Continued discussions on the emerging use of APIs within our distribution channel. In 2020, the group began creation of a 'API Partner Security Discussion Guide' to help all stakeholders - Carriers, Vendors, and Agents - understand security issues when holding partnership discussions.

**Data-Driven Industry Work Group:** Assembled in 2020, to create education and awareness around the increase of business intelligence, analytics, and artificial intelligence resources emerging in our distribution channel. The intent is to create clear insights on the vendor-and carrier-enabled tools, as well as drive toward consensus on the most effective data-driven workflow implementations for our distribution channel.

**Future Issues Work Group:** Began work on an Artificial Intelligence 'Deep Dive' in 2020 expected to be completed mid-2021.

**Agent-Carrier Technology Work Group:** Will reassemble in 2021 to review and revise our most recent recommendations for [balanced agency contract language](#) regarding technology aspects such as third-party vendor regulations and other emerging cyber and security concerns.

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In 2020, ACT members also created a robust [ADA/Accessibility](#) resources web page, helping our distribution channel understand and take action on Accessibility regulations. Additionally, ACT released an all-new '[Remote Work Best Practices](#)' guide in March 2020 to help all stakeholders – agents, carriers, and tech providers – set their businesses for success in a remote and hybrid work world.

ACT holds two meetings annually bringing together carriers, vendors, agents, and user groups to discuss best practices, industry technology trends and other topics that focus on how technology can help the independent agent distribution channel be more efficient and effective.

ACT publishes a bi-monthly newsletter "ACT News" which provides 4-5 brief articles with links to additional info, timely videos, interviews with industry leaders, and a calendar of events. Distribution for this newsletter is now over 4,400.

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FUTURE ONE.

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