

# Big “I” Professional Liability Program Risk Management Reference Guide



The Big “I” Professional Liability program believes that risk management is key in not only preventing errors, but also in providing agencies with tools to more efficiently service their customers. All policyholders of the Swiss Re Corporate Solutions/IIABA professional liability program have exclusive access to the risk management information developed from our more than 30 years of experience insuring agencies. Westport Insurance Corporation is a member of Swiss Re Corporate Solutions. These risk management resources are exclusively available to your agency as a valued policyholder of the Swiss Re Corporate Solutions/member of IIABA.

## Big “I” Risk Management Website – E&O Happens

The website contains comprehensive information and tools such as: the common mistakes that cause E&O claims, real-life case studies for learning, best practice tips, sample disclaimers, procedures and client letters, operational self-assessments, E&O-related articles, and more. Visit [www.iiaba.net/EOhappens](http://www.iiaba.net/EOhappens) to login. (FREE)

## Rough Notes Advantage Plus

Rough Notes Advantage Plus is a web-based resource providing comprehensive tools such as industry specific client risk exposure checklists and questionnaires and to better understand the coverage needs of customers and assist the agency in avoiding E&O claims from failing to offer proper coverage and failing to identify customer exposure. Visit [www.iiaba.net](http://www.iiaba.net) to learn more. (Fee-based)

## E&O Claims Advisor Newsletter

Published monthly and emailed to agency staff, this newsletter provides valuable information on agency E&O trends and hot topics. (FREE)

## Risk Management Webinars

Each quarter, timely webinar sessions will be featured to address emerging E&O risk management topics. Less than an hour in length and perfect for all agency staff, the webinars include detailed discussion from industry leaders on reducing exposure to E&O claims. (FREE)

## Agency E&O Seminar

Administered by IIABA state associations, E&O seminars are an excellent way to increase procedural and knowledge-based E&O risk management awareness to agency personnel. Agencies with the requisite number of staff attending may qualify for a premium credit and may also qualify for CE credits providing a double benefit. (Fee-based)

## Agency Operational Improvement Review

A review of your agency operations is available. Voluntary completion of this review may qualify you for a E&O premium credit on the next renewal, valid for several years depending on your state. (Fee-based)

## Big “I” Virtual University

VU is a website with information on hundreds of insurance related business and technology articles, white papers and information affecting today’s insurance marketplace. It also provides a forum to answer questions that can’t otherwise be found in the research library through the “Ask an Expert.” Visit [www.iiaba.net/vu](http://www.iiaba.net/vu). (Free)

## Big “I” Agents Council for Technology (“ACT”)

ACT brings agents, carriers, vendors, user groups and industry associations together in an effort to employ the best workflows and technologies available within the independent agency system in order to improve our competitive edge. Please visit the ACT website at [www.iiaba.net/act](http://www.iiaba.net/act) and watch the short video briefing on the site to get a good overview of the high-quality information that we make available to agents and carriers. (Free)

Should you have any questions, please contact your state association or Chris Boggs at [chris.boggs@iiaba.net](mailto:chris.boggs@iiaba.net). We appreciate your continued support of the Big “I” Professional Liability Program and Swiss Re Corporate Solutions and hope you find these risk management resources useful in helping your agency avoid E&O claims.