



ACT Work Groups – 2025 Year in Review

Driving Innovation Together

In 2025, ACT's **Data**, **Connectivity**, and **AI [Work Groups](#)** collaborated to strengthen the technology foundation of the independent agency channel. Through thoughtful discussions and practical outputs, these groups advanced shared priorities around data quality, interoperability, and responsible innovation.

Key Themes and Achievements

- **Data Readiness as a Foundation:** All three groups emphasized the importance of clean, accurate, and consistently formatted data. This focus supports better workflows, reporting, and readiness for advanced technologies like AI.
- **Connectivity and Integration:** Members addressed persistent challenges such as duplicate entry, inconsistent standards, and limited API adoption. Strategies included advocating for common security protocols and creating educational resources to demystify technical concepts for agency leaders.
- **Responsible AI Adoption:** The AI Work Group explored frameworks for ethical implementation, including transparency, bias mitigation, and governance. Practical tools such as an [AI Readiness Checklist and vendor evaluation resources](#) were developed to guide agencies, and these resources—along with additional tools—were collected into an [AI Resource Hub webpage](#) to provide a centralized destination for learning and evaluation.
- **Education and Enablement:** Across all groups, role-based education emerged as critical. Initiatives included the "[Bad Data, Big Impact](#)" **Quick Guide** for data improvement, a four-part [Exploring AI](#) podcast series, and plans for a **Tech Education Series** are currently in development to simplify connectivity topics for agency principals and staff.

Looking Ahead

In 2026, these work groups will continue to build on this momentum by creating practical, accessible resources that help agencies improve data practices, strengthen connectivity, and adopt technology responsibly. Together, they are shaping a stronger, more integrated future for independent agencies.

ACT 2025 Work Group Participants

Alvito	Vaz	ID Federation	Kathy	Bova	Agent Support Network of America
Amanda	Eaves	NYCM	Keith	Israel	Nationwide Insurance
Amanda	Dorsett	PIIAC	Ken	Samson	Dasco Insurance Agency
Amy	Hendrickson	Association of Wyoming Insurance Agents	Kevin	Dorgan	FirstChoice MarshBerry
Andrea	Axne	Hilb Group LLC	Kevin	Wheeler	Angela Adams Consulting
Andrew	Zimmer	Nationwide Insurance	Kevin	Sindelar	Acrisure LLC
Andrew	Quinn	Westfield Insurance	Kimberly	Fox	O'Connor Insurance Associates, Inc.

Angela	Ford	IIAT	Kyle	Fox	Chubb
Ann	Funk	Encova Insurance	Lauren	Crosby	Catalytit
Anthony	Gardner	Gardner & Strayer Insurance Group	Lauren	Malcolm	Applied Systems
Arjun	Mangla	Fulcrum	Lexie	Tonelli	Fulcrum
Ashley	Engl	Walsh Duffield Companies	Maddie	Kriek	Leonard Adams Insurance
Bobbie	Collies	Coterie Insurance	Manreen	Kaur	ACORD
Brent	Sheppard	Xanatek, Inc.	Marianne	Policastro-Wik	Insurance Association of Central CT, LLC
Brian	Konen	Konen Insurance Agency	Mark	Harrison	Amplo (Frm Veruna)
Charles	Frumerie	Applied Systems, Inc.	Matt	Petersen	CNA

Chris	Cargill	Westfield Insurance	Matt	Pandiscia	Foremost
Chris	Light	Amplo	Matt	Swenson	Security Insurance
Christen	Losey	Losey Insurance Agency	Matthew	Wood	Insur-West Inc
Colby	Tunick	ReFocus AI	Matthew	Aman	HawkSoft
Colleen	Mazey	Reschini Agency	Max	Smith	ReFocus
Crystal	Meador	Biltmore Insurance Services	Melissa	Gatto	Lawley
Dale	Steinke	Liberty Mutual Insurance	Mia	McGowan	IIABA/Trusted Choice
Danielle	DuFour	NBT Insurance Agency	Michael	Ley	HawkSoft
David	Levine	Newbrook Insurance Agency	Michael	Rabinowitz	Applied Systems, Inc.

Deidre	Stone	Rich & Cartmill, Inc.	Nicholas	Peddle	Dyad
Doug	Mohr	Vertafore	Nicholas	France	ACORD
Dustin	Crawford	Applied Systems	Patrick	McBride	The McBride Agency
Elizabeth	Smoller	Kansas Association of Insurance Agents	Paul	Peeples	FL Assoc of Ins Agents
Jason	Furst	Catalyit	Pedro	Pinho	AgentSync
Jason	Kilgas	McClone Insurance	Rachel	Levien	Encova Insurance
Jason	Gobbel	Kite Technology Group	Ray	Huang	Canopy Connect
Jeannine	Giesler	Ohio Insurance Agents Association	Roberto	Salinas	GAIL (Frm Lula)

Jeff	Glubish	Agents Choice Insurance Agency Inc	Robin	Bennett	Grange Insurance
Jen	Kuras	Hanover Insurance	Rose	Hancock	Zywave
Jennifer	Lawrence	Grange Insurance	Rushang	Shah	HawkSoft
Jerry	Fox	HawkSoft, Inc.	Ryan	Hankinson	Penn National Insurance
Jessica	McFadden	Grange Insurance	Sarah	Iceman	The Florian Insurance Agency
Joe	Clabaugh	The Cincinnati Insurance Company	Sarah	Shear	Grange Insurance
John	Warn	Rue Insurance	Shannon	Chatman	Liberty Mutual
John	Herrmann	Insurance Marketing Agencies	Shannon	Churchill	Big I Illinois

John	Schoonover	Gannon Associates Insurance	Shawn	Bown	EMC Insurance
John	Thomas	Liberty Mutual	Smith	Jerry	Mountain West Ins & Financial Services
Joseph	Cook	The Arizona Group	Spencer	Breidenbach	BrightFire
Joseph	Cox	Trusted Choice	Spring	Weidman	NYCM
Josh	Goodman	Waypoint Insurance Midwest	Steve	Forte	Patra Corporation
JP	Pritchard	Rhodian Group	Steve	Anderson	Catalyit
Julie	Meehan	Leonard Adams Insurance, Inc	Tammie	Hoard	Insurance Agency Services LLC
Justin	Walter	Progressive Insurance	Tate	Tooley	Bloss & Dillard

Kaley	Abernathy	TIS Insurance Services, Inc	Tom	Chamberlin	Mandeville Insurance Agency
			Wes	Bissett	IIABA