

WELCOME!

AI for Growth

Measuring the Real Impact of AI



Kevin N Wheeler,
CIC, CPIA, CFI
Eastern Advisory Manager
Angela Adams Consulting



Kathryn Lerch,
MBA
Solutions Engineer
Fulcrum



Troy Moody
COO
Moody Insurance Agency

Session 1 of Agency AI Labs – Phase 2 (Growth & Operations)



Agency AI Labs

BROUGHT TO YOU BY

BIG i
AGENTS COUNCIL
FOR TECHNOLOGY.

Agenda

- Welcome
- Part 1 – Starting with the Business Problem
- Part 2 – Measuring What Matters
- Part 3 – Turning Efficiency into Growth
- Part 4 – Lessons Learned
- Framework to Start Now
- Agency Challenge
- Questions

Welcome to Phase 2

- Overview
- Housekeeping items



JP Pritchard
Program Manager ACT (IIABA)

What you signed up for...



Agency **AI** Labs

PHASE 2

Free AI training for independent insurance agencies.
Real skills. Real workflows. No tech background required.

BROUGHT TO YOU BY



- ✓ Free for Big "I" Members
- ✓ Free for ACT Partners

Phase 2 Sessions – Tuesdays in Aug • 2PM ET • Live On Zoom & On-demand

4 Aug	Session 1 AI for Growth: Measuring the Real Impact of AI
11 Aug	Session 2 Your AI Customer Service Rep
18 Aug	Session 3 AMS Providers Panel: What's Actually Built In
25 Aug	Session 4 Claude in the Agency: A Live Working Demo

Today's Panel



Kevin Wheeler

Moderator



Kathryn Lerch

Fulcrum



Troy Moody

Moody Insurance

Thank You!

ACT
SUPPORTING
PARTNERS

ACORD

AR Agency
Revolution

AgentSync

amplio

Angela Adams Consulting
Shining the light to your success

APPLIED

AUGIE Group
an insurance tech exchange

BIG i

bolt

brightfire

Canopy
Connect

Cara

CATALYT

CHUBB

CINCINNATI
INSURANCE COMPANIES

CNA

cogneesol
Re-imagine. Re-invent.

Coverflow

CSIO

dyad

emc
INSURANCE

encova
INSURANCE

eventual treasury

experience.com

EZLynx

Fall Line
SPECIALTY LLC

FOREMOST
A Farmers Insurance Company

Fulcrum

Gail

The Hanover
Insurance Group

HAWKSOFT

HUG
HawkSoft User Group
EMBRACING TECHNOLOGY TOGETHER

SignOn Once
BY ID FEDERATION

indio

INSURANCE BROKERS
ASSOCIATION OF CANADA

ivans

KITE
TECHNOLOGY

Liberty Mutual
INSURANCE

MAIN
STREET
AMERICA
INSURANCE

MERCHANTS
INSURANCE GROUP

NATIONAL
GENERAL
an Allstate company

NASA

Nationwide
is on your side

NetVU
STRENGTH IN MEMBERS

Ohio Mutual
Insurance Group

PATRA

PENN NATIONAL
INSURANCE

PLANCK

PROGRESSIVE

ReFocus

The Institutes
RiskStream Collaborative

SELECTIVE
BE UNIQUELY INSURED

TARMIKA

TRAVELERS

vBots
INTELLIGENT ASSISTANTS

Vertafore

WESTFIELD

Xanatek
Simple, Powerful Technology to Grow Your Agency

ZYWAVE
INSURING GROWTH

Reminders

- This session is being recorded – you will receive an email with the recording tomorrow afternoon
- Ask questions in the chat!
- The Agency AI Labs Community is LIVE – details in follow-up newsletter
- Please fill out the after-session survey



Disclaimer

The views and opinions expressed in connection with Agency AI Labs are those of the speakers and do not necessarily reflect the official policy or position of the Agents Council for Technology (ACT), IIABA or its subsidiaries and affiliates. The program is intended for general informational purposes only and should not be considered legal, investment or other professional advice. For specific expert advice, the services of an appropriate professional, such as an attorney or accountant, should be sought.



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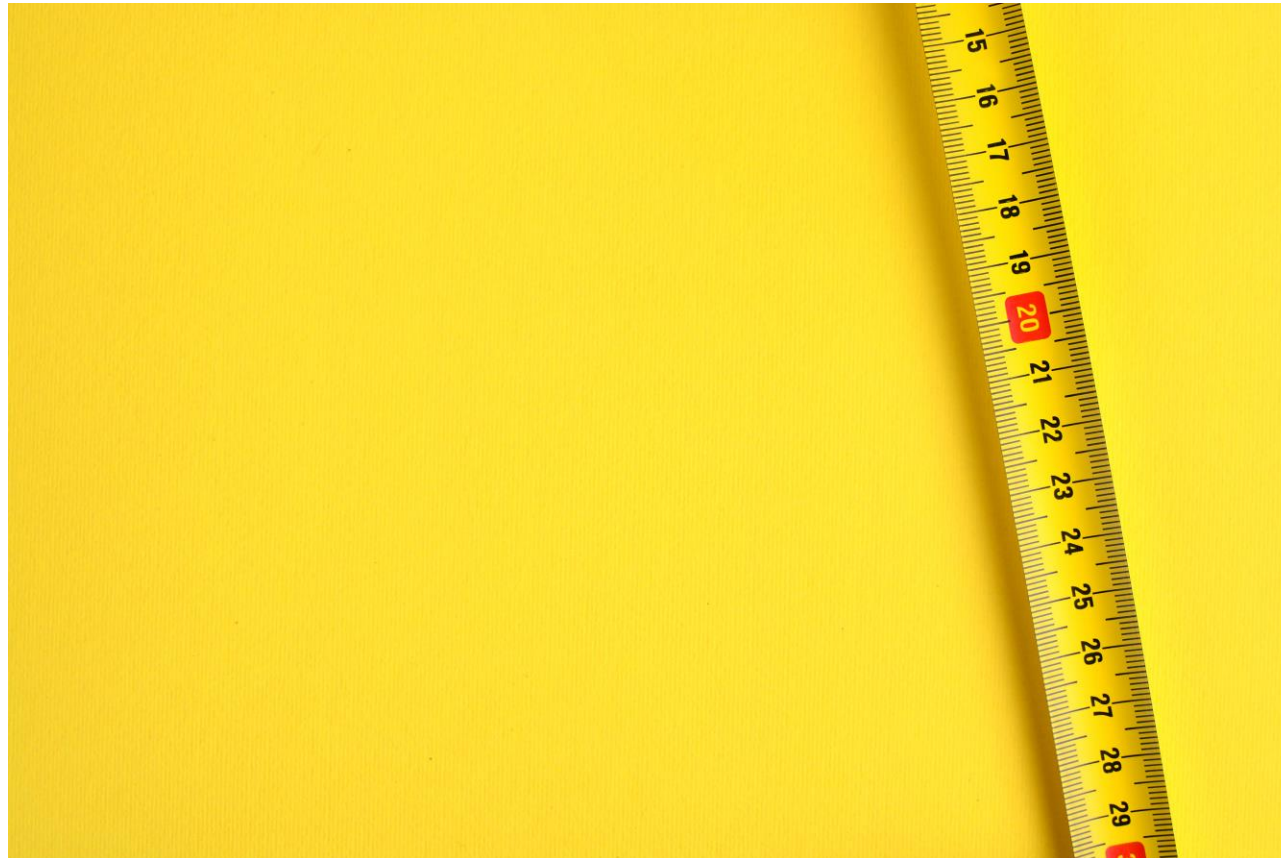
Poll Time

Where is your agency today?

Part 1 – Starting with the Business Problem



Part 2 – Measuring What Matters



What business metric matters most in YOUR agency today?

(Post in the chat)



Part 3 – Turning Efficiency into Growth



Poll Time

When AI creates extra capacity....
Where does that time typically go?

Part 4 – Lessons Learned



ACT AI Impact Framework

- Step 1 – Establish a Baseline
- Step 2 – Measure Efficiency
- Step 3 – Measure Effectiveness
- Step 4 – Measure Business Growth

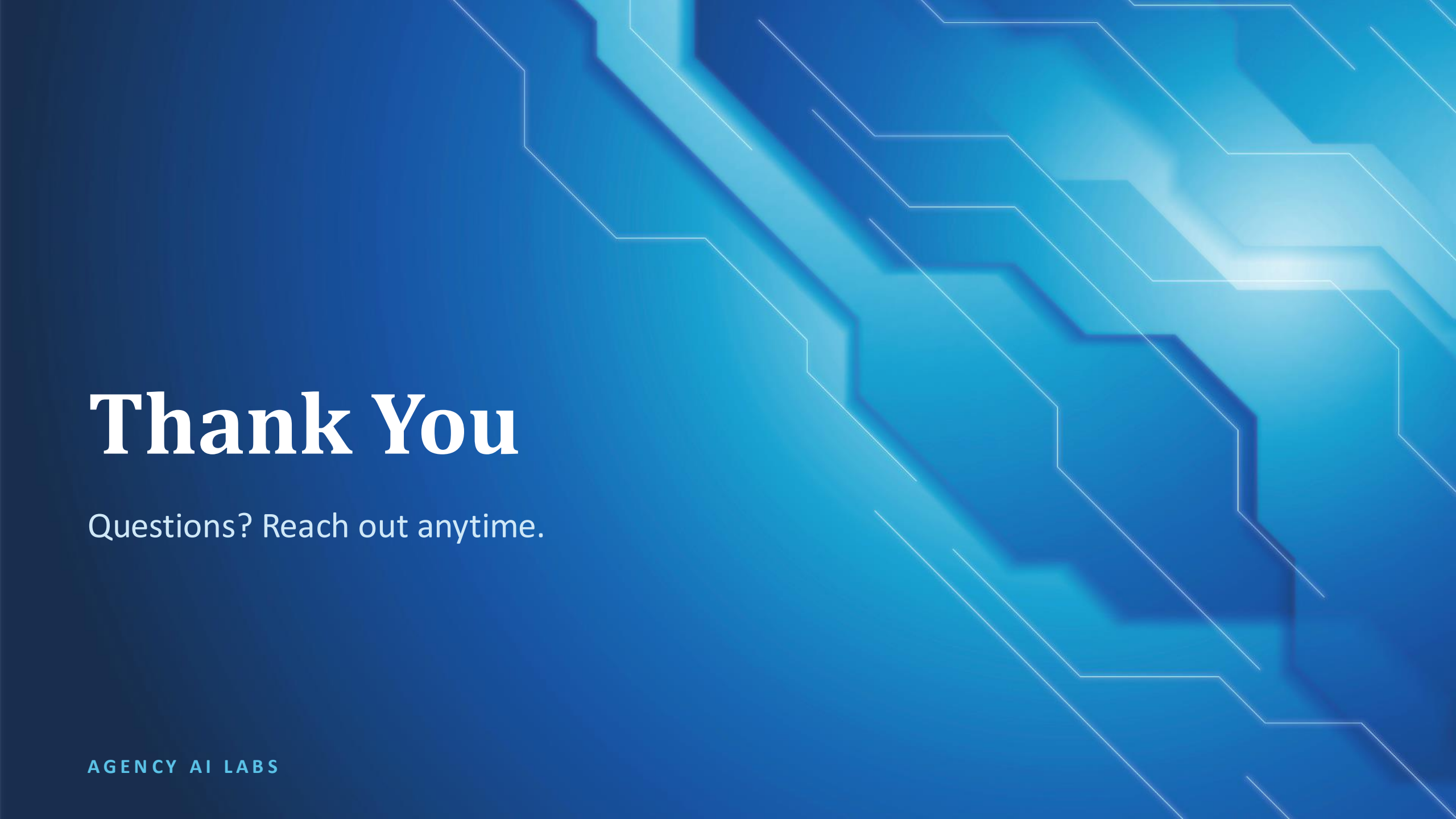


Poll Time

What's ONE business metric you'll begin tracking over the next 90 days?

Your Challenge...





Thank You

Questions? Reach out anytime.

AGENCY AI LABS

CLOSING & WHAT COMES NEXT

Upcoming Session

Aug 11 @ 2pm ET

Session 2 – Your AI Customer Service Rep



Homework

ID one workflow where you're using AI and establish a baseline. Then choose one business metric to track over the next 90 days.

Please fill out the after-session survey!

