



2023 Accomplishments and 2024 Plans

Chris Cline, Executive Director and Ginny Winkworth, Program Manager

The Agents Council for Technology (ACT), a program of the Big "I", enables the industry's technology conversations. This forum of agents, brokers, technology providers, carriers, and other industry groups conducts research, provides collaborative recommendations, and creates resources to help independent agents make strategic decisions about the use of technology in their agencies. Through work groups, webinars, conferences, presentations, panels, and more, ACT partners come together to share insights and create industry-wide education for all Big "I" agents. They provide recommendations on emerging trends, cybersecurity, customer experience, data & analytics, disaster planning, and other tech-related focus areas.

<https://www.independentagent.com/ACT>

FY23 Committee Members:

Tom Chamberlin, MT (Chair)
Shannon Churchill, IL
Matt Wood, UT

Michael Vance, AL
Angela Ford, TX
Angela Ripley, MD (Exec Committee Liaison)

Highlights from ACT's 2023 Accomplishments

- Partnered to deliver/host several Big I **Insurtech Summits**
 - o Initial summit in January 2023 in Savannah, GA. (2 panels, multiple podcasts)
 - o With **Fortified in** August 2023 in Birmingham, AL
 - o With **Keystone in** September 2023 in San Antonio, TX
- **Launched a new Emerging Trends Work Group** in person at NetVu Accelerate in May 2023 in Austin, TX and hosted kick-off concept meeting following surveys of interested members.
- **Held ACT "Back to Basics" Event, October 2023 in Columbus, OH hosted by Encova Insurance**, with partner panels on Data, API/Connectivity, AI. Currently developing videos to share as well as a follow-up social campaign.
- Completed our **Customer Experience Lifecycle website refresh** in Q1 2023.
- Became deeply involved in a project to **overhaul the ACT Cyberguide** with our Security Issues Workgroup.
- Published ACT's **"View and Summary of the Agency Universe Study"**.
- **Chris spoke as keynote/panel moderator** at following events and State Associations in 2023. Each event was an opportunity to engage the industry with ACT as a thought-leader, resource across multiple technology/culture/hiring disciplines, and directly interact with all our stakeholder groups: agents, technology companies, carriers, states and other industry organizations.

Mississippi	Nevada - June
Illinois - April	Missouri – July
Keystone Emerging Leaders – April	NetVU (3 industry panels) – May
IBNO	BGSU Summit on AI w/Oll and Jobs Ohio
Ohio	Illinois
Massachusetts	3 Big I Insurtech Summits
ACT Meeting - October	Kansas
NetVu Spark in November	Bankers Insurance Board Presentation

- Additional **Industry engagement for ACT/Industry**:
 - o 13 Webinars hosted and published with ACT partners: All can be found here: [Technology Solutions for Your Business | ACT Webinars \(independentagent.com\)](#)
 - o 3 Industry Podcasts (Briteway, Total Agent, Insurance Reimagined) – each in last quarter
 - o 1 Article submitted to Agentsync blog
- Continued our **Partner Thank You and Recognition** campaign on social media. We are planning to revamp the campaign and continue partner recognition through 2023 and in to 2024.
- **“Proud Supporter” initiative** for ACT supporting members, providing a way for members to show their support of the IA industry with “Proud Supporter” badge.
- **Extended offers to meet with all ACT Partners to align 2023 contact plans** – based on how each partner advised they wanted to be engaged in 2023 via our YE22 partner survey. Explored new ways in which to engage to benefit members and continued conversations on alignment opportunities with Catalyt.
- **Added new members**: totaling 9 new for the year.
- **Partnered with ID Federation for Cyber/MFA Survey** in support of Cyber Awareness Month.
- Continued to evolve **ACT News** and solicit more content from our partners. Sign up to receive: <https://www.independentagent.com/ACT/Pages/ACTNewsletter/default.aspx>
- **2024 Pricing Model and Invoicing for 2024** – 10% increase in ACT Member dues.
- **Transitioned committee leadership** as Cindy Hower’s multi-year term expired, we welcomed Tom Chamberlin as our new chair and Matt Wood joined the committee.

ACT’s 2024 Plans

- **2024 is the 25th Anniversary of ACT.** We’ll partner with marketing to develop supporting logo/mark that is brand compliant as well as a recurring social strategy and other potential content to celebrate this milestone.
- **Continue Partner Engagement momentum** – To launch 2023, we surveyed partners about how they’d like to derive value from their partnership with ACT. That generated two outcomes that we will carry in to 2024.
 - o **ACT News** – In addition to our own content, we’ll continue soliciting partners for thought leadership insights that align with their areas of expertise in the industry. We have grown the distribution of ACT News and will continue to explore ideas in which we leverage current success.
 - o **Partner Webinars** – These have proven to be an impactful way of engaging with our valued partners while offering thought and content to the market and our members.
 - o **One-One Industry Conversations** – We welcome the continued opportunity to work with individual companies to share industry insights, participate in their internal research or development efforts, speak to employees or agents at company functions, or other ideas.

- **Re-engage our three active Work Groups** with regular cadence and productization of thought-leadership established with the groups.
 - o **Customer Experience Lifecycle** – this body of work was refreshed in 2023, but the team has new ideas about how to expand its relevance in 2024.
 - o **Cyberguide 3.0** – The team spent a large amount of time in 2023 discussing an approach to clean up the current cyberguide, modernize it, and make it more user friendly. Leveraging these plans, we'll work to update the Cyberguide and consider a rebrand.
 - o **Emerging Technology Trends** –This group got off to a healthy start but did get suspended due to some reasons outside of our control. We'll look at how to best use this group to explore new topics and potentially new concepts in work group approaches.
- **Meeting(s) / Events.** 2023 was a unique year as we partnered to pilot the Insurtech Summit in three locations as well as testing how smaller more targeted meetings could work for ACT – partnering with other events for our Work Groups as well as a carrier partner for a broader ACT driven conversation. At the time this document is published, we are continuing to assess feedback from each approach to determine how and where ACT can most meaningfully offer impact in the market. We continue to believe in the power of in-person, formal meetings where our agency members and company partners have a place to interact and explore how technology can enable an industry strategy.
- **Speaking Engagements** – We are grateful for the continued opportunities to participate in other industry events: state associations, technology company user groups, networks conferences, master minds, and large agency board retreats. These are a powerful way for us to accomplish many of our goals aligned with sharing and learning directly with agents, states, company partners, and other industry organizations. We welcome the opportunity to discuss how we can support other events as a keynote, panelist, moderator, or educator (we have done several sessions that received CE approval in their respective states).
- **New Partners** – Though we have not had a formal new partner recruiting effort in several years, we are open to referral calls and thoughts about carriers or technology providers that are aligned to the long-term viability and success of the independent channel. ACT offers a format for these companies to be a part of the conversations that help agencies consider what technology can enable their goals, solve their problems, and create net new capabilities.
- **Internal Big I Initiatives** – Though less visible to the market and our partner companies, two large scale initiatives are underway at the Big I that will require time and resources from ACT and other programs. Each will provide long-term benefits to employees, agents, and our other stakeholders.
- **Long Term Strategy** – We are currently involved in a body of work to assess how ACT and the Big I can/should evolve in how we show up and influence the industry from within the technology space. The scope, timing, and impact of this work is being researched and discussed as we consider all angles that range from future needs of the industry, the ways in which we can have a material impact, what impacts that may have on our current work and approach, and ultimately how our members and company partners can be best served by their association.
- **The Great Unknown** – These are unprecedented times, and we are experiencing rapid change. This is a placeholder and catchall for opportunities that may emerge through the year. ACT will do our best to remain positioned to maximize these possibilities and even make trade-offs if necessary.

Thank You to All of [Our Partners](#).

We Cannot Do This Without Your Amazing Support!

Here's to an amazing 2024!