



ACORD Carrier Session and AUGIE Meeting

Las Vegas, NV — May 24, 2010

Who should attend?

Decision makers from carriers that want to find out what their companies need to be doing to make more sales and be recognized for quality service.

What will happen at this event?

- Agents will share their stories on how they're succeeding with companies that are easy to do business with.
- Carriers will share their stories on what they need to do to become recognized as a company easy to do business with.
- Vendors will share high level summaries of how they will help you succeed at becoming recognized as a carrier that is easy to do business with.

When?

Monday, May 24th from 10:00 AM, through the Reception at ACORD LOMA's Exhibit Hall.

Where?

Mandalay Bay
3950 Las Vegas Boulevard South
Las Vegas, Nevada, USA 89119-1006
1-877-632-7000 or 1-702-632-7000

Why should you attend?

- Learn how to drive out costs and pain points. Ease of doing business is often the deciding factor in placing an account with a particular company. If the company is priced in a competitive range and the coverage is similar ease of doing business with that company will prompt the CSR, Placer or Agent to put the risk with the carrier that makes it easy to do business and who's systems connect most effectively with the agency systems.
- Hear directly from agents what their technology needs are. Even if they have our own technology council, the agents that attend these meetings are representative of the most tech savvy and efficient agencies.
- Get the information your IT development teams need to help set priorities.
- Be one of the first to hear the details on the initial release of the 2010 AUGIE Survey Results!

Highlights of February 2010

ACORD AUGIE Meeting Tampa, Florida

On February 4, 2010 agents, brokers, carriers and solution providers all met to continue the dialog on improving ease of doing business and data sharing along with gaining a better understanding of each other's pain points.

ACORD's Senior Vice President John Kellington kicked off the meeting by giving an update on ACORD activities including eForms, the ACORD Certified Expert program and the ACORD Framework. He also issued a call to action and a focus on implementation to help the industry improve efficiency.

Case Study

A case study by Brightway Insurance COO Michael Miller showed how important ease of doing business is for agents in a competitive marketplace and the vital role that real time and download play in supporting his efforts. He explained how his company favors those carriers that use Real Time and Download higher as they make it easier for his staff to do their jobs and write more business rather than research rates and enter data.

Agent Panel

Donna Barr of Premier Insurance Consultants of the Treasure Coast, Inc. led off for the agents explaining that it's about the workflow not the components and real time is a journey not an end. She walked the audience through the numerous ways that implementation of these programs support agents in doing their jobs. The more business they write, the more business carriers get — it all starts and ends with data. This was echoed by the rest of the panel that included: Virginia Vaughan, North Florida Agents Network, Inc. - ANEU; John Gardner, Lee County Insurance Agency, Inc.; Earl Kelly, Greene-Hazel & Associates; and Robert Ludwig, Ludwig-Walpole Insurance Agency. The sentiments of the panel were summed up by Gardner: "Just give me my data!"

Carrier Panel

Curt Overpeck of Citizens Insurance began for the carrier side describing his company's recent implementation of download that was in pilot. He explained what his company went through to get the job done, the time lines involved, and the future steps already planned. Gary Lawrence, Allied Insurance, updated the audience on his company's latest innovations including entering a password once - and never again - to access their site using an agency management system. He also emphasized how essential it was to "follow ACORD Standards" when doing projects. The panel concluded with Teresa Addy of EMC Insurance who explained her company's work with real time and download and how they were working to do more. She shared her experiences in launching and completing these efforts, the work involved, and plans for future implementations.



Carrier Session and AUGIE Meeting

Room: TBD

Mandalay Bay

Las Vegas, NV

Nothing happens unless the sale is made! The industry goal is to ensure that independent agents have more time for service, retention and sales. **This session is designed for insurance carriers** that want to know why they should be providing real time and download functionality and how they will make it happen!

Arriving on May 23rd?

Please join us for a reception from 5:00 pm -7:00 pm. Secure your badge at the registration desk.

Monday - May 24, 2010 - Agenda

<u>Start time</u>	<u>End Time</u>	<u>Speaker</u>	<u>Topic</u>
AUGIE Begins			
7:30 AM	8:00 AM		Continental Breakfast
8:00 AM	9:45 AM	Lisa Goth - Rotational Chair AUGIE Spero Zacharias - Chair PSC Steering Committee	<ul style="list-style-type: none"> • AUGIE Business • ACORD Implementation Discussion • eSignature Presentation • Personal Lines Forms
9:45 AM	10:00 AM	Break	
Carrier Session Begins			
10:00 AM	10:15 AM	Ron Binning, Andy Fogarty and ACORD Joe Feo - PCS Implementation Subcommittee	Welcome and Introduction
10:15 AM	10:45 PM	Jim Armitage Tentative: West coast agents	Hear from a panel of west coast agencies that are realizing the benefits of real time and download technology. Hear from these principals about how real time and download tools have enhanced their business.
10:45 PM	11:15 PM	Liberty Mutual - Mele Fuller MEMIC - Gary Baxter Scottsdale - Jacque Burm Fireman's Fund - TBD	Hear from carriers that are doing real time and download. Hear how ACORD Standards play a role in their implementations, and the results they are seeing because they provide this technology. Ask the panelist

			questions about what they learned along the way.
11:15 AM	11:45 AM	Applied Systems CSC DocuSign Ebix IVANS Jarus Technologies LexisNexis NxTech Sword AgencyPort Vertafore	Hear from <ul style="list-style-type: none"> • The agency management system vendors that provide the agents with systems that contain real time and download technology. Take the opportunity to hear from the vendors and ask them questions that will help you to succeed. • The raters/builders of solutions that will help your company provide real time and download tools you're your agency force. Then you make the decision if your company will be buying or building the solutions.
12:00 PM	2:00 PM	ACORD Awards Luncheon	
2:00 PM	4:00 PM	Lisa Goth Spero Zacharias	Initial release of the AUGIE Survey Results
4:00 PM	7:00 PM	ACORD LOMA Exhibit Hall and Reception	

Dress Code: Business Casual

Registration <http://www.iiaba.net/cbsupx/education/evtpreview.aspx?evt=9426>

This event is being in conjunction with:

2010 ACORD LOMA INSURANCE SYSTEMS FORUM



Smart solutions to:

- Increase operational efficiency
- Improve the customer experience
- Implement strategies for tomorrow's marketplace
- Build personal and social networks

May 24–26, 2010

Mandalay Bay Resort
Las Vegas, NV

Registration is Open!

www.acordlomaforum.org