

Friday, April 27

9:45 a.m. – 11:00 a.m.

Course #4121

Principal Connection

Industry Change Requires a New Producer Profile

Level: ALL Target: PC

Our industry is changing fast, and the producers of the past will struggle to be successful. This session will give insight to why it is changing, what attributes the future producer will have if they are going to be successful, and also address how multiple generations will play into this dilemma.

Larry G. Linne, Sitkins Group Inc.

Course #4122

Principal Connection

What CEOs Need to Know About IT Mgt.

Level: ALL Target: PC

Agencies have become increasingly automated over the last couple of decades. You and your clients have to be able to access information in "real time." With the adoption of agency management systems, everyone in your agency has become more tech savvy, including you. However, the IT team is still the one keeping those systems running. Do you know how to monitor your systems? Do you know what questions to ask your IT team to ensure the seamless flow of information within your agency, the industry, and with your customers? This session will discuss questions to ask your IT department about upgrades, system downtime, E&O exposure, contingency plans, disaster recovery, and other security measures.

Steve Anderson, The Anderson Agency Report (TAAR)

11:15 a.m. – 12:30 p.m.

Course #4221

Principal Connection

Round Table: Executives/Carriers

Level: ALL Target: PC

The goal of this session is to provide a vehicle for open communication among carriers, agencies and Vertafore to enable representatives to discuss key insurance automation priorities, and develop ideas to move these initiatives forward.

Stephen Moriyama,

Course #4222

Principal Connection

Growth By Improving Your Digital Marketing

Level: ALL Target: PC

See how easily you can improve retention and generate more prospects, more clients and more growth by improving your digital marketing. This innovative executive level session is designed for agency principals with strategies that really work today and a blueprint for leading your organization to a new level of success in the digital world. You're sure to come away with a better understanding of the critical marketing principles, an integrated approach to your digital marketing strategy, and five simple improvements you can implement immediately to ensure new prospects will choose you over your competitors. The Consumer Agents Portal (CAP) is possible the largest single effort within the Independent Agency System to level the playing field for online marketing.

Martin P. Agather, CPCU, ARM, Entrepreneurial Advantage Consultant

2:15 p.m. – 3:30 p.m.

Course #4321

Principal Connection

Discover Innovative Ways to Grow Agency's Top Line

Level: ALL Target: PC

Is driving top line growth and how you are going to achieve it keeping you up at night? Agencies need to focus on growing their top line, which means concentrating on increasing sales, and providing a superior experience so their customers return year after year and buy more. Find out how executives at winning agencies use innovative best practices as crucial drivers of their business growth strategy, exceed their targets daily...and rest well at night.

Vertafore,

Course #4322

Principal Connection

Developing the Next Generation of Producers

Level: ALL Target: PC

Learn the answer to the million dollar question: "How do you recruit and develop a million dollar producer?" This session will include key characteristics of a high potential candidate;

essential agency roles and responsibilities;
technical and sales consultative training;
developing and maintaining pipeline activities;
and proven tools to drive and exceed sales
goals.

*Jennifer DeMello-Johnson, Agency Services
Group*

3:45 p.m. – 5:00 p.m.

Course #4421

Principal Connection

Discover the Value of Online Client Self-Service

Level: ALL Target: PC

Learn how your peers are utilizing online access and client self-service to increase customer satisfaction, and streamline agency productivity. During this panel discussion you will learn how customer self-service adds value to your website, leveraging the power of the Internet for sales and client services. You will also hear about the exciting mobile optimized web services these agents are extending to their clients and discover how you can add these tools into your customer service strategy.

Artizan Internet Services

Course #4422

Principal Connection

How to Avoid the Potholes in M&A

Level: ALL Target: PC

Hindsight is 20-20. In retrospect, many agency sellers look back and realize they left money on the table because they did not properly prepare their businesses in advance for the sale. We will discuss the most common mistakes agency sellers make, and proper preparation to ensure the agency is as attractive as possible to the buying community so it fetches the highest possible price.

Tom Doran, Reagan Consulting Inc.

Saturday, April 28

8:15 a.m. – 9:30 a.m.

Course #5121

Principal Connection

Generating Real Business Via Blogging

Level: ALL Target: PC

This session looks at real world insurance agency case studies, and demonstrates how blogging on a regular basis can generate solid

website traffic and allow independent insurance agencies to dominate specific insurance niches. The class is meant to give participants a clear game plan and best practices for blogging.

John Boudreau, Astonish Results

Course #5122

Principal Connection

Predictable Producer Success

Level: ALL Target: PC

How is your sales team doing? This course will teach you how to put a Sales Process Map in place to accelerate sales activities, eliminate obstacles, and easily track activities. You will also learn how to identify early signs of success or failure, so you can address concerns quickly. Lastly, this session will take on the sixteen call reluctance concerns salespeople often cite, and teach you how to manage and overcome them in your agency.

Thomas Redmond, Jr., Redmond Group, Inc

11:15 a.m. – 12:30 p.m.

Course #5221

Principal Connection

Best Practices for Agency Perpetuation

Level: ALL Target: PC

This workshop will explore why agencies fail to properly address perpetuation, and what they can do to pattern their plan with the best results in mind. We'll discuss agency objectives for a perpetuation plan, why developing the next generation is key, and how adjusting the plan over time keeps the process on track.

Paul Martin, CPCU, PZ Martin Education

Course #5222

Principal Connection

Cash, Kudos or Pizza-Just What Motivates Your Staff

Level: ALL Target: PC

You've heard the statistics from polls. You've heard grumblings in your break room. You've tried to motivate your staff, but you still feel you are missing the mark. This class will demystify determining what motivates your team. Take a look at your style, as well as roles and

motivators for individuals on your team. We will help you identify how to best address members of your team and keep everyone motivated through communication, skills assessments, and team building.

Carletta Neal, The Omnia Group

2:15 p.m. – 3:30 p.m.

Course #5321

Principal Connection

Drive Producer Results With Ins. Sales Management

Level: ALL Target: PC

While many insurance agencies have processes in place to move a sale through the appropriate steps to issuing a policy, they lack the technology to effectively manage the sales process. This deficiency may not immediately seem critical to some, but it is only when agencies are able to track and manage the sales processes that they are able to understand their strengths and weaknesses as an organization, and influence future sales performance. Let us share how using a sales management system designed specifically for insurance agencies can forecast, manage and drive sales, and produce results like never before.

Paul Areida, Vertafore

Course #5322

Principal Connection

Business Drivers for Marketing Online

Level: ALL Target: PC

Being active on social media has become critical to the growth of any business. You've heard all of the reasons why an online presence is important, but you may still not understand how to execute an effective online marketing campaign through social media. Using concrete examples from other agents like you, this laser focused session will offer you guidance for each of the most critical online channels where your customers are active. You will learn how to establish your social media presence and learn how to leverage these tools to reach your target customers to grow your business.

Vertafore

3:45 p.m. – 5:00 p.m.

Course #5421

Principal Connection

Marketing Fundamentals: Communicate Competitive Edge

Level: ALL Target: PC

Are you overwhelmed with the amount of marketing advice you receive? Don't be! This fast-paced, nuts and bolts session will break down the marketing process, and help you create a simple and focused agency marketing plan. Participants will learn how to market so your customers will buy, five key components of a successful marketing plan, five strategies to effectively communicate your message, and more.

Emily Huling, CIC, CMC, Selling Strategies Inc.
