



CIO

Working Group

RECAP

October 24-25

EXECUTIVE SUMMARY

The CIO Working Group gathered October 24-25, 2016, to talk through strategic and operational aspects of agency operations from their technological perspective. The Working Group focused on Customer Relationship Management and Sales Automation, along with the best practices for Data management as well as focusing on the current state of Insurtech companies and investment strategies. The group then received a state of affairs update from The Council's Government Affairs team. The group ended its session with a collaborative discussion on individual issues.

PARTICIPANTS

AHT Insurance
All Risks Limited
AmWINS Group Inc.
Assurance Agency, Ltd.
BancorpSouth Insurance Services Inc.
Burns & Wilcox
Capacity Holdings Group LLC
Cottingham & Butler
Edgewood Partners Insurance Center
Frenkel & Company
Fringe Benefit Group

Hylant
Keenan
Lovitt & Touche
Murray Securus
Risk Strategies Company
Starkweather & Shepley Insurance Brokerage, Inc.
Swingle, Collins & Associates
The IMA Financial Group, Inc.
The Partners Group
The Plexus Groupe LLC
TrueNorth Companies

INSURTECH UPDATE

Investment in Insurance Technology startups has increased significantly over the past year. The Council's CIO Chris Gagnon presented an update on the investments, strategies and players involved in the attempted disruption of our industry. Gagnon also spoke about new information and developments within Zenefits and Lemonade. **Please see the corresponding slides for more information.**

GOVERNMENT AFFAIRS UPDATE

Joel Wood and Joel Kopperud from The Council's Governmental Affairs team provided an update on the state of affairs in Washington, the upcoming presidential election and the status of legislation important to the agent and broker industry.

CRM: TALES FROM THE TRENCHES

Guest speaker Andrew Bartels from PS Advisory identified some of the most common hurdles agencies experience when implementing CRM and identified key success factors and strategies. He discussed the struggle that agencies have with CRM implementation and adoption and offered direction on increasing adoption and value.

DAY TWO

COLLABORATIVE DISCUSSION

The next day, participants of the CIO Working Group gathered to discuss their challenges on technology opportunities and challenges inherent to agency operations. Members were asked to share their top automation challenges for group discussion.

Discussion

Several participants collaborated and brought new insights to the group.

- What is the strategic focus of technology in an agency?
- Where is everyone with infrastructure services in their company?
- When considering transitioning to the cloud what does that mean for employees that hug the hardware? How do you bring these IT employees along in the journey?
- What are best practices for dealing with content management?
- Has anything changed with client self-service and/or self-portals?
- Companies that allow employees to work from home...do they take equipment home or provide them with new technology to keep in their homes? How are agencies providing mobile work environments that have a unified experience in in-office systems?
- What email systems are companies using to perform mass marketing?

NEXT MEETING

The next CIO Working Group meeting will take place February 6-9 during The Council's Legislative & Working Groups Summit in Washington, D.C.

QUESTIONS?

Contact The Council's CIO Chris Gagnon at christopher.gagnon@ciab.com.