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## NEWS

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### **Big “I” Publishes New Guide to Enhance Agency Profitability**

*Resource includes Best Practices philosophies which help agencies improve workflows.*

ALEXANDRIA, VA Aug. 13, 2008—The Independent Agents & Broker of America’s (the Big “I”) latest agency improvement tool helps agencies move to advanced workflows and eliminate paper in order to free up staff time for sales and pro-active customer service. The new “Best Practices Guide to Agency Business Processes and Information Management” replaces two earlier guides and incorporates the latest in agency workflows, such as Real-Time. Like the earlier guides, it is a collaboration between the Big “I” Agents Council for Technology (ACT) and Council for Best Practices working with noted agency workflow consultant Laura Nettles.

“Our agency used the guide when it was first developed, and we recognized tremendous improvement in our agency processes,” says Angelyn Treutel, Chair of ACT, Vice President of Treutel Insurance Agency in Bay Saint Louis, Miss. and a Trusted Choice® and a Best Practices agency. “The guide contains a wealth of practical information and model workflows that agencies can use to continue to improve their operations.”

The 155 page resource is available at [www.independentagent.com/act](http://www.independentagent.com/act) and is designed to be used electronically because it contains numerous links for easy navigation. The guide enables agencies to conduct a self-assessment in technology, management support, workflows, agency/carrier interfaces, Real-Time utilization and client focus, and then provides step-by step guidance on how to move to the next level of agency workflow. It also provides steps to implement a comprehensive information storage plan for all forms of media and documentation, including paper, scanned documents, e-mails, voice mails, notes, faxes and pictures.

“We are thrilled to make this invaluable guide available to independent agents across the country as a member service,” says Susan Leslie, Chair of the Council for Best Practices, President of Bragdon Insurance in York Village, Maine, and a Trusted Choice® and Best Practices agency. “We deeply appreciate the opportunity to work with

Laura Nettles on this guide given that she has spent her entire career helping agencies improve their business processes.”

Numerous agents and carrier representatives participating in ACT and the Council for Best Practices, including several Best Practices agencies, also contributed their expertise to help produce the best possible resource for the industry. The guide outlines detailed, practical information for agency improvement, including detailed property-casualty and benefits workflows and a quick reference guide for categorizing and retrieving electronic documents.

“I was delighted to contribute my expertise and experience to this industry effort that involved so many talented agents and carrier representatives,” says Laura Nettles of Nettles Consulting Network in Atlanta. “I’m seeing agencies today that have achieved a true client environment where their focus is strongly external—on the client—because they have been able to free up their staff to take on more value added roles by automating processing and eliminating paper wherever possible. These agents are more efficient, have stronger client relationships, have more time for sales and have enhanced their profitability.”

Established in 1999 by the Independent Insurance Agents & Brokers of America (the Big “I”), ACT provides a candid, action-oriented forum for agent and industry associations, user groups, companies and vendors to address critical technology and workflow issues facing the independent agency system and provides agencies with reports and tools to assist them in making improvements in their businesses.

Founded in 1896, the Big “I” is the nation’s oldest and largest national association of independent insurance agents and brokers, representing a network of more than 300,000 agents, brokers and their employees nationally. Its members are businesses that offer customers a choice of policies from a variety of insurance companies. Independent agents and brokers offer all lines of insurance—property, casualty, life, and health—as well as employee benefit plans and retirement products. Web address: [www.independentagent.com](http://www.independentagent.com).

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