

49th ANNUAL

Jan. 29-31, 2012 • Renaissance Austin Hotel

JOE VINCENT

Management Seminar

**The leading seminar
for independent
insurance agency
leaders and managers**

**Building a Digital Relationship
With Your Clients and Prospects
with Terry Jones, Founder
of Travelocity**

**How to Market to People
Not Like You**

**Texas Commissioner of Insurance
Eleanor Kitzman**

Plus -

Managing Market Relationships

Marketing Personal Lines in the Digital Age

**Cyber Security: Protecting Your
Customer Data**

**Agency Morale Checkup: Maintaining a
Positive Work Environment**

**Designing Competitive Compensation
Plans**

**Achieving a Balance Between Management
and Leadership**

**Introducing the Independent Agent Portal
And More!**



**Independent
Insurance**
Agents of Texas

- Learn from industry innovators and experts.
- Network with your peers.
- Earn CE credit at seminar sessions.
- Go back to the office ready to tackle your biggest challenges.

SUNDAY, JAN. 29

3:15 – 5:15 p.m.

2012 Industry Preview

New Certificate Procedures

FILED FOR 2 CE CREDITS

The IIAT staff will bring you the latest information on Texas and national issues affecting independent agents. Receive an update on the certificates bill that became effective on Jan. 1, 2012 and how TDI plans to enforce the new law, changes with TWIA, and updates on health insurance reform.

6 – 7:30 p.m.

Welcome Reception

MONDAY, JAN. 30

7 – 8:30 a.m.

Breakfast

8:30 – 10:15 a.m.

Building a Digital Relationship With Your Clients and Prospects



Terry Jones
CHAIRMAN OF KAYAK.COM
FOUNDER OF TRAVELOCITY

NO CE

Terry Jones founded Travelocity.com and led the company as president. Now, he is a highly-sought e-commerce consultant. How will your customer contact you today? Whether it's in your office, via the phone, on your website, via a tweet or a friend request on Facebook, there are so many ways to communicate with customers. In this session, Terry gives you the keys to unlock the mystery of how to connect with customers online. While face-to-face communication isn't going away, businesses that don't have an effective online relationship strategy are being left behind. Terry will share his expertise on all phases of the digital conversation from search to social media, using real-world examples drawn from his long experience in the online world.

10:45 – 11:45 a.m.

How to Market to People Not Like You



Kelly McDonald
MCDONALD MARKETING

NO CE

The best business opportunity in decades might be right in front of you. With more than 20 years of experience, Kelly McDonald is a national marketing and advertising agency expert who helps companies extend their marketing reach into new populations and market segments. Her clients have included Toyota, Sherwin-Williams, Budweiser, Harley-Davidson, Mattel, Ace Hardware and Nike.

11:45 a.m. – 1 p.m.

Lunch

BREAKOUT SESSIONS

1 – 2:30 p.m.

Cyber Security: Protecting Your Customer Data



Steve Anderson
WWW.STEVEANDERSON.COM

FILED FOR 1.5 CE CREDITS

One of the industry's top technology consultants, author and speaker, Steve Anderson discusses the sensitive and personal client information that agencies store on their systems, and how this confidential data needs to be secured and protected at all times for legal compliance.

1 – 2:30 p.m.

You Can Hire a Successful Producer



Brian Jenkins
THE JENKINS GROUP

FILED FOR 1.5 CE CREDITS

It's tough competing with other attractive industries for the best sales talent, but Brian Jenkins believes you can do it. Brian shows you how to identify the winners, sell them on your agency and validate their performance. Brian is recognized as one of the top producer coaches and sales trainers in the country.

1 – 2:30 p.m.

Agency Morale Checkup: Maintaining a Positive Work Environment



Mary Newgard, AU
CAPSTONE SEARCH GROUP

FILED FOR 1.5 CE CREDITS

Don't let the early signs of poor employee morale go unchecked at your office. As a successful insurance producer for a nationally recognized independent insurance agency and an experienced agency consultant, Mary shares the three keys to strong employee morale that impact agency growth and employee retention.

1 – 2:30 p.m.

What's Your Agency Worth?: Practical Agency Valuation Methods

Panel Discussion

FILED FOR 1.5 CE CREDITS

Agency mergers and acquisitions continue and recent data reflects that agency values overall are finally rebounding. Join a panel of agency consultants and agents as they review agency valuation methods, several case studies and the key lessons learned in having a successful buying and selling transaction.

BREAKOUT SESSIONS

3 – 4:30 p.m.

Introducing the Independent Agent Portal



Scott Deetz
CEO,
CONSUMER AGENT PORTAL, LLC

NO CE

Scott Deetz introduces the Consumer Agent Portal (CAP) which will deliver digital marketing tools and services to increase the online market presence of independent agencies, brokers and carriers in personal lines insurance. Learn first-hand about CAP, an industry initiative driven by the leadership vision of key insurance carriers and IIABA, along with Trusted Choice and Big "I" state associations.

For complete seminar details
and online registration visit

iiat.org

3 – 4:30 p.m.

Managing Market Relationships

Panel Discussion

FILED FOR 1.5 CE CREDITS

Juggling market commitments while maximizing your competitiveness is a challenge in many agencies today. In this panel discussion, experienced agency managers discuss their strategies for monitoring markets and placements, communicating with producers and service staff and maximizing profitability in a highly competitive commercial market.

4:30 – 6 p.m.

Reception

TUESDAY, JAN. 31

7 – 8:30 a.m.

Breakfast

BREAKOUT SESSIONS

8:30 – 10 a.m.

Globalization of the Insurance Industry



Shaun Hooper
CEO, COOPER GAY & CO. LTD

FILED FOR 1.5 CE CREDITS

Shaun Hooper is CEO of Cooper Gay & Co Ltd, the Lloyd's and London market broker of Cooper Gay Swett & Crawford Ltd, the largest independent global wholesale and reinsurance broker. He joined Cooper Gay in 2009 with responsibility for coordinating and developing global operations to enhance client service, and to support Cooper Gay's growth strategy. Join Shaun as he provides insight into how the industry has changed as a result of globalization and what impact those changes will have on markets and brokers in the days and years to come. He will use the recent natural disasters in Texas and across the U.S. as examples of how local issues can affect the industry worldwide.

8:30 – 10 a.m.

Designing Competitive Compensation Plans

Mary Newgard, AU

CAPSTONE SEARCH GROUP

FILED FOR 1.5 CE CREDITS

As a successful insurance producer for a nationally recognized independent agency and now an accomplished consultant with national brokerages, regional firms and independent agencies, Mary discusses when it's time to change your compensation plans and how to design a plan that is competitive and profitable for you and your producers.

8:30 – 10 a.m.

Marketing Personal Lines in the Digital Age

Steve Anderson

WWW.STEVEANDERSON.COM

NO CE

Showing up on a Google search results page is a key way to generate new business. Maximizing your Internet presence requires understanding how search engines work and then learning the specific steps that anyone can take to increase chances of being visible in a search. The good news is that it costs little to nothing to get started. In this presentation designed specifically for agencies marketing personal lines products, Steve Anderson details what's needed to launch and boost effective digital marketing.

8:30 – 10 a.m.

Achieving a Balance Between Management and Leadership



Lee Whittington, Ph.D.
UNIVERSITY OF DALLAS

FILED FOR 1.5 CE CREDITS

As a consultant to major U.S. firms and a respected college professor, Dr. Whittington describes the roles of managers and leaders and how these two essential skill sets can strike a balance to pilot your agency to continued success.

10:30 – 11:15 a.m.

Meet the New Commissioner



Eleanor Kitzman, Commissioner
TEXAS DEPARTMENT OF INSURANCE

NO CE

Meet the new Texas Commissioner of Insurance Eleanor Kitzman and hear about her activities since taking the position in August and her vision for the Texas insurance industry.



FOLLOW IIAT ONLINE

Connect with colleagues and get the latest on industry news and events.

- www.facebook.com/iiatx
- www.linkedin.com
- www.twitter.com/iiatexas

SESSIONS FOR EVERY ASPECT OF AGENCY MANAGEMENT

Operations/Human Resources

- Cyber Security: Protecting Your Customer Data
- Managing Market Relationships
- Agency Morale Checkup: Maintaining a Positive Work Environment
- Designing Competitive Compensation Plans
- You Can Hire a Successful Producer

Strategic/Leadership

- What's Your Agency Worth?: Practical Agency Valuation Methods
- Globalization of the Insurance Industry
- 2012 Industry Preview
- Achieving a Balance Between Management and Leadership

Sales/Marketing

- Building a Digital Relationship With Your Clients and Prospects
- How to Market to People Not Like You
- Introducing the Independent Agent Portal
- Marketing Personal Lines in the Digital Age

"Networking, knowledge and fun – what more could you ask for? I attend IIAT's Joe Vincent Seminar every year to get the latest agency management insight."

FRANK SWINGLE, PRESIDENT, SWINGLE, COLLINS & ASSOCIATES



Independent Insurance
Agents of Texas

49th Annual

Joe Vincent Management Seminar

Jan. 29-31, 2012

Renaissance Austin Hotel

1. Use a separate form for each registrant.
2. Mail: IIAT, P.O. Box 142363, Austin, TX 78714-2363; Fax (credit cards only): 512.469.9512; Online: iiat.org.
3. IIAT will e-mail you a registration confirmation; if you don't receive one within three weeks, call 800.880.7428.

Name _____

Badge name _____ Designation(s) _____

Agency/Company _____

Address _____

City, State, ZIP _____

Phone _____ E-mail _____

Check enclosed for \$ _____ Visa Mastercard AMEX Discover

Card # _____ Exp. date ____/____ Amount charged \$ _____

Name on card _____

Signature _____

REGISTER ME FOR:

JOE VINCENT MANAGEMENT SEMINAR, JAN. 29-31

AGENTS

IIAT agency member, \$275\$ _____

Additional attendee from same member agency, \$220\$ _____

First-time attendee from member agency, \$200\$ _____

Non-member, \$375\$ _____

COMPANY REPRESENTATIVES

IIAT member, \$275\$ _____

Non-member, \$375\$ _____

Total enclosed.....\$ _____

HOTEL RESERVATIONS

Call the Renaissance Austin Hotel at 512.343.2626 and ask for the IIAT group rate of \$177 for a single or \$187 for a double. Reservations will be handled on a space-available basis until rooms at the special rate are sold out or until the reservation cut-off date of Friday, Jan. 6, whichever comes first.

Register online using the secure registration form under:

iiat.org > Events & Conferences

For more information look online or call IIAT at:

800.880.7428



Independent Insurance Agents of Texas