

Brown Palace Network
Final List of Roundtable Topics
for April 10-11, 2025

1) How are other agencies sending policies to clients?

- Are you emailing them & attaching?
- Are you hard copy mailing them?
- Are you making the client sign off that they actually received the policy through DocuSign or some other e- signature mechanism?

(Mike Stoop)

2) Have you ever thought about switching to AMS360 due to Applied Epic cost?

(Sidney Francis)

3) Do you track your average commissions by Dept? If so, what are you seeing with them? If they are decreasing, what strategy do you have to reverse it? (Ryan Thompson)

4) How are others perfecting their proposals to clients? We are seeing other agents add definitions of coverages on the proposals – is that good or bad? (Christie Elliott)

5) What are other agents using AI for? Is it helpful? (Christie Elliott)

6) What's the best way for protecting your agency against the E&O exposure of a client's EPLI claim? (Mike/Chris)

7) Has anyone had experience with an employee having mental health issues? Any suggestions for helping management and co-workers manage the situation? (Lynn Salinas)

8) What are the best agencies doing to provide additional coverage training and education for producers and staff? What options exist to support these efforts from 3rd parties outside of the National Alliance? (Brayden Jessen)

9) Progressive seems to be continuing their dominance and growth in Auto, while struggling to have the same success in other lines of business. Do you see this dominance in Auto ultimately extending to other lines in the PL space, and also into the small commercial space? (Brayden Jessen)

- 10) What experience (success and shortcomings) do others in the group have in working with Applied Epic Dashboards? (Brayden Jessen)
- 11) What is the stock market's impact on carriers?
- 12) How can agents use AI to reduce time spent on repetitive and mundane tasks? What is the best use of AI and what insurance procedures should agents o stay away from using AI?
- 13) What are the latest AI threats to agency/Insurance system? How do we use the threats as opportunities? Other than expanding our coverage knowledge and being available to our clients, how do we secure our future?