

Brown Palace Network
Final List of Roundtable Topics
for September 25-26, 2025

- 1) I have a large real estate schedule that we prepare Accord Apps for. It appears the Accords do NOT organize the information in an efficient way, as you cannot tell by location all of the following information in one place:

Named Insured
Location Address
COPE
Mortgagee

The Accord 125's are a nightmare. How does everyone else use the Accord Apps for large schedules?

(Mike Stoop)

- 2) Have any agencies successfully segmented PL clients and/or small CL clients for the services that the agency offers? Has anyone created or thought about creating a separate and branded entity to handle a portion of personal lines or small commercial clients in a different manner with different service standards than other personal lines or small commercial clients? (Brayden Jessen)
- 3) What wholesale brokers are agencies using for personal lines? (Brayden Jessen)
- 4) How do you utilize AI within the accounting department? (Ryan Boudreaux)
- 5) As agency principals, what financial data would you like to see provided by your accounting department head? (Ryan Boudreaux)
- 6) What cyber limits do you carry for your agency? Who (what carrier) do you have it placed with? (Ryan Boudreaux)
 - a) Do you have vendors provide you with a COI showing they have Cyber Insurance? What vendors do you get this from?
 - b) What have you done to protect your agency from a cyber loss?
- 7) Who has accepted a GEICO appointment? How has your experience been so far? (Chris Burand)

- 8) How do we fairly pay our employees for getting work done rather than just working?
My end goal is to really pay for quality work and pay fairly for the rest of the work. It will require discussion around helping top employees learn to prioritize daily work flows to focus on quality work rather than random acts of kindness or reactive servicing. (Pat Dewey)
- 9) I am strongly against working remotely but I am open to ideas on how other agencies are making it work because I feel I may end up losing the battle someday!
(Pat Dewey)
- 10) Lots of people are talking about how AI is a powerful tool in our industry. Are we there yet? If so, what tools are being used to improve our daily work lives?
- 11) We struggle with profitability on accounts that were once the purview of some of the direct markets. After they exited the market, we are stuck with the accounts which we now have to place through the wholesale market place, which requires a manual renewal process with supplemental applications and such each year.

What is the minimum account revenue agencies are setting for their DIRECT Accounts?

What is the minimum account revenue agencies are setting for their WHOLESALE Accounts?

I'm just curious. Ours is a BROKERAGE Market, not an Agency Market.

(Mike Stoop)

- 12) What products are other agencies using to obtain electronic signatures of applications and proposals? (Brayden Jessen)