



May 2015



<a href="#">NATIONAL LEGISLATIVE CONFERENCE WRAP-UP</a>	1
<a href="#">MONTANA WINS 3RD CONSECUTIVE INSURPAC EAGLE AWARD</a>	3
<a href="#">PREPARE TO MASTER CUSTOMER SERVICE</a>	3
<a href="#">MONTANA YOUNG AGENTS TAKE ON D.C.</a>	4
<a href="#">YOUNG AGENT SCHOLARSHIP WINNER: FROM RANCH TO HILL</a>	5
<a href="#">GUIDELINES FOR THE TRUSTED CHOICE® BRAND</a>	6
<a href="#">MAY/JUNE EDUCATION SCHEDULE</a>	7
<a href="#">MEMBER CLASSIFIEDS</a>	7



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## National Legislative Conference Wrap Up

by Bob Biskupiak, IIAM Executive Director

Another successful legislative conference is in the rear view mirror. This year’s conference in Washington DC was productive and rewarding.

The Montana Big “I” attendees included:

- John Braut, Wolfe Daniels Insurance Agency, National Director
- Bob Biskupiak, Independent Insurance Agents of Montana, State Executive
- Perry Wolfe, Wolfe Daniels Insurance Agency, State InsurPAC Chair
- Tom Chamberlin, Mandeville Insurance, Young Agent Chair

- Jeremy Norby, Seitz Insurance, First time Young Agent Attendee
- Jade Boggs, The Insurance Store, First time Young Agent Attendee
- Joe Menyhart, W.A. Mitchell Agency, First time Young Agent Attendee



[\(Continued on page 2\)](#)

[Return to table of contents](#)

[\(Continued from page 1\)](#)

It is never too early to start thinking about attending next year's conference and perhaps a recap of activities and events will peak your interest the 2016 Legislative Conference.

### Wednesday

- Young Agents Welcome Reception
- Young Agents & InsurPAC Chairpersons Legislative Luncheon with guest speaker Representative Kyrsten Sinema from Arizona
- Make-A-Wish Celebration
- Legislative Briefing & Reception



### Thursday

- Legislative Conference Breakfast featuring guest speakers House Majority Whip Representative Steve Scalise (Louisiana) and Senator Heidi Heitkamp from North Dakota.
- Big "I" Day on Capitol Hill; the Montana contingency met with Senator Tester, Senator Daines and Representative Zinke to discuss insurance regulatory reform, health care, crop insurance, risk retention act expansion, department of labor fiduciary standards, flood insurance and tax reform.
- Senator Daines personally gave us a tour of the Capitol, which included taking us to the Senate Chambers and the Speaker of the House's balcony (definitely not on the public tour!)



- Traditional wrap-up celebration at the world famous Dubliner Irish Pub
- YAC Gives Back & InVest Silent Auction, over \$62,000 was raised to support InVest scholarships

### Friday

- General session breakfast featuring a panel of CEO's from Liberty Mutual, The Hartford, CNA and The Motorists Insurance Group.
- Diversity Forum

There was plenty of time for the group to tour Washington DC. Actually there is so much to see, they could only see the most popular monuments and sites. The Young Agents, under YAC Chair Tom Chamberlin's leadership, also carved out time to see two Washington National and St. Louis Cardinals games and traveled to Baltimore to see the Orioles and Boston Red Sox games.

Fun, educational and effective meetings defines a successful conference!

[Return to table of contents](#)



# Montana Wins 3rd Consecutive InsurPAC Eagle Award

by Bob Biskupiak, Executive Director

Perry Wolfe deservingly accepted the prestigious Eagle Award on behalf of the Independent Insurance Agents Association of Montana at the National Legislative Conference in Washington DC.

Only a few state associations earned this distinguished recognition, which only makes it sweeter that this is Montana's 3<sup>rd</sup> consecutive year.

Recipients of this award must average InsurPAC contributions in excess of \$100 per member.

Montana agent's contributions totaled \$12,665 in 2015. This is money well spent to protect our livelihoods.



Our thanks go out to our members agents that have made InsurPAC contributions and especially to Perry Wolfe, who has done a superb job as our State InsurPAC chair. Montana is already off to a good start in 2015. [Return to table of contents](#)

## Prepare to Master Customer Service

Today, your independent agency has more opportunities to prosper than ever before. Today's marketplace enables your agency to be the hub of its own community as well as a member of many other communities—all of which are populated by consumers.

The long-term success of your business depends on customers, so before you try to sell another policy, consider two key questions: Who is today's consumer? And what should "customer service" mean in today's marketplace?

The new Best Practices series "The Customer Service Experience-An Independent Agent's Guide to Serving Today's Consumer" can help. This 11-part series will provide direction on meaningful, valuable and profitable customer service as a foundation of your business.

The first four installments are now available online:

- [Meet Today's Insurance Consumer](#)
- [Bring Real Meaning to "Customer Service"](#)
- [Know Your Agency](#)
- [Understand Your Marketplace](#)

This series will serve as a long-term guide in adjusting and enhancing your customer service focus, combining information and hands-on guidance to help your agency clearly define customer service goals and focus your efforts on achieving them.

Follow the series each month on the [Big "I" Best Practices website](#). For more information about the content, contact the [Best Practices Staff](#).

[Return to table of contents](#)

# Montana Young Agents Take On D.C.

D.C. was an epic experience to say the least.

If choosing between visiting the monuments on foot at night, or a high speed train and a jeep tour, or the Marine Corps War Memorial & Arlington National Cemetery, all of what we took in on this trip was amazing. Visiting the hill you really get to feel the buzz of Washington. We even ran into Commissioner Monica Lindeen while walking to the Hill!

Senator Daines was overjoyed to show us around the Capitol. My most memorable moment was when Senator Daines took us out on to the Speaker of the House's balcony overlooking the Mall. It was truly amazing. This trip really showed me the importance and power of D.C. It also made me think that if you want to make a difference, the only way it can be done is by getting involved.

Joe Menyhart, W.A. Mitchell Agency



I would encourage all insurance personnel from across the independent agency spectrum to attend a Big I Legislative Conference sometime in their career. From private congressional delegation meetings to networking events to fantastic socials, this one meeting place has it all.

Tom Chamberlin  
Mandeville Insurance



This experience was a great opportunity to better understand how the national legislative process affects us in our day to day agency activity. Would recommend it to anyone making a career of the insurance industry.

Jeremy Norby, Seitz Insurance

The Big "I" Legislative Conference gave me a completely different insight on how our rules and regulations are implemented on the Hill. We met our Montana Congressmen as the experts in our industry. I left the Conference feeling good about what the Big "I" does for our insurance industry in Washington, D.C. I would love to go back and represent Independent Insurance Agents of Montana.

Jade Boggs, Insurance Store/Broadus Insurance

[Return to table of contents](#)

# Young Agent Scholarship Winner: From the Ranch to the Hill

by Jacquelyn Connelly, IA Magazine Senior Editor



Not many agents and brokers can say they work for the same agency that has insured their family's personal and commercial risks for some 40 years. But that's the experience of Jeremy Norby, Big "I" young agent at Seitz

Insurance in Sidney, Montana and recipient of this year's Maurice Herndon Scholarship to attend the Big "I" Legislative Conference.

Norby's grandfather started became a Seitz client in the early 1960s, and his father still insures his farm, ranch and trucking company with the agency. "That's part of what drew me here—I knew long-lasting relationships were important to them," Norby says.

After working as a pharmaceutical rep in Alaska for three years, Norby and his wife headed back to his hometown Sidney to raise their daughter.

"I was farming and ranching back here, and it was not a great time to be in farming and ranching," Norby remembers. "I was looking for another gig to do with it." After spotting an ad in the paper for an open position at Seitz, Norby went in to speak with the owners—and the rest is history.

Now, he works for two brothers "who are very local and believe in a lot of the same stuff I do," says Norby, who will celebrate his eighth anniversary with the agency this fall. "We're very involved in our community, we're more of a relationship-type place. And I still farm and ranch a little bit on the side."

This time of year, Norby has his hands full with calving. "I go out early in the morning to take care of feeding and getting everything ready for the day," he says. "I'll be in the office by 9-10 ready to hit my day running." But in late April, he took a break from double duty to attend the Big "I" Legislative Conference on Capitol Hill in Washington, D.C.

Presented each year to one young agent who is a first-time attendee to the Big "I" Legislative Conference, the Maurice Herndon Scholarship allows the recipient to attend the conference free of charge.

Its namesake refers to the former head of the 1949 Big "I" Washington, D.C. office, who built the association's government affairs and grassroots operations. For Norby, it's an interest that began back in college when he held an internship with the Senate Finance Committee.

"I'm very interested in knowing how much legislation affects our industry and to see how it works from the other side of the coin," says Norby, who currently serves on the Legislative Board for the Independent Insurance Agents of Montana as well as his state's Young Agents Committee. "Our city in Montana is very rural. Any time we get the opportunity to actually go where the action is, it's definitely good in that respect."

In particular, Norby is looking forward to gaining actionable insights for his business. "Whenever I go to something I try to take two or three good pieces of knowledge back to our agency and see if we can't implement them," he says. "I'm not going to discover

[\(Continued on page 6\)](#)  
[Return to table of contents](#)

[\(Continued from page 5\)](#)

the cure for cancer. But if somebody's doing something that's really awesome, I can go 'Hey, why can't we do that? What's stopping us from rolling this out at our place?'"

In Norby's home state, constituents are concerned with insurance issues like crop and health care. But

beyond specific insurance issues, the conference presents "an opportunity to hear from people who are more dialed in than I am," Norby says.

"There are people who do this every day. I don't—I sell insurance every day. So it's nice to be able to look to them and say 'OK, what's going on? What's important and why is it important? The information's out there—where do I go to get it?'"

[Return to table of contents](#)



## Guidelines for the Trusted Choice® Brand

by Natalia Rogers, Education Director



Independent Insurance Agent

Trusted Choice® is the national marketing brand created exclusively for Big "I" members to help consumers understand the value that an independent agent offers. The name and

logo have been consumer tested, meaning that it resonates very well with your potential customers.

As an IIAM Member and Trusted Choice® agency, you can benefit from using the Trusted Choice® logo. It's not meant to replace your brand, but rather take the role of a stamp of approval alongside your established identity.

Consistency in how the logo is used is important to it's success. Trusted Choice® has created a set of guidelines that must be followed. Download the guidelines [here](#), or visit the [Agent Resource Center](#),

where you'll find additional marketing tools.

### Things to Remember:

- Never re-create or alter the Trusted Choice® logo
- The primary Trusted Choice® colors are Pantone 287 (blue) and black
- Only reproduce the Trusted Choice® logo in all blue, all black, blue and black, all white or metallic silver
- Do not allow any other element to touch or interact with the logo
- The Trusted Choice® font is Frutiger
- Do not use a two-color logo on a non-white background

When in doubt about how to use the Trusted Choice® brand, email [Joanne Buckley](#) or [Kiescha Cherry](#).

[Return to table of contents](#)



# MAY/JUNE SEMINAR SCHEDULE

[Return to table of contents](#)

Date	Location	Seminar Name	
5/19/15	Kalispell	Personal Lines Miscellaneous (CISR)	<a href="#">register</a>
5/20/15	<i>webcast</i>	Ethics In Today's Changing Times	<a href="#">register</a>
	Missoula	Ethics: Your Client, Your Practice, Your Industry	<a href="#">register</a>
	Missoula	2013 Legislative Changes	<a href="#">register</a>
5/20-23/15	Missoula	Personal Lines Institute (CIC)	<a href="#">register</a>
5/21/15	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change	<a href="#">register</a>
	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change Part 1	<a href="#">register</a>
	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change Part 2	<a href="#">register</a>
5/26/15	<i>webcast</i>	Certificates of Insurance	<a href="#">register</a>
	<i>webcast</i>	Insurance and BBQ - The Hidden Connection	<a href="#">register</a>
	<i>webcast</i>	COPE - Property Underwriting and Effective Loss Control	<a href="#">register</a>
6/02/15	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change	<a href="#">register</a>
6/04/15	Helena	Insuring Personal Residential Property (CISR)	<a href="#">register</a>
6/09/15	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change Part 2	<a href="#">register</a>
	<i>webcast</i>	Commercial Lines Claims That Cause Problems	<a href="#">register</a>
	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change Part 1	<a href="#">register</a>
6/10/15	<i>webcast</i>	General PAP Parts A and B	<a href="#">register</a>
6/11/15	<i>webcast</i>	Certificates of Insurance	<a href="#">register</a>
6/17/15	<i>webcast</i>	Ethics In Today's Changing Times	<a href="#">register</a>
	<i>webcast</i>	General PAP Parts D, E & F	<a href="#">register</a>
6/18/15	<i>webcast</i>	Insurance and the Property Lease	<a href="#">register</a>
	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change Part 2	<a href="#">register</a>
	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change	<a href="#">register</a>
6/22/15	<i>webcast</i>	E&O Risk Management Meeting the Challenge of Change Part 1	<a href="#">register</a>
	<i>webcast</i>	Dueling Additional Insured Endorsements	<a href="#">register</a>
	<i>webinar</i>	ACT presents "The Customer Experience Journey"	<a href="#">register</a>
6/23/15	<i>webcast</i>	Insurance and BBQ - The Hidden Connection	<a href="#">register</a>
6/25/15	<i>webcast</i>	Home Based Business Exposures	<a href="#">register</a>

[Return to table of contents](#)

## MEMBER CLASSIFIEDS

### E&O Administrator—Helena, MT

Public Risk Insurance Management seeks experienced insurance professional to serve as association's Errors and Omissions Program Administrator. Responsibility includes managing the E&O program for member agencies and coordinating workers compensation business for association. [Download application](#) & submit with resume.

### Business Development Executive—Missoula, MT

This position with Main Street America serves as the lead field contact for assigned agents with ownership for profitable growth. Overall assignment will entail a select core of current and prospect "high growth potential MSA agencies" within a geographic territory. Accountabilities include agency management and aggressive new business development driving assigned agents to meet their business plan. [Click here for full details & how to apply](#)

[Return to table of contents](#)