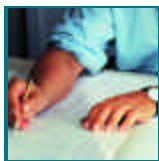
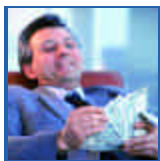


2004 best practices product catalog





big "i" virtual university

**"OUTSTANDING
INFORMATION!**

**THIS VIRTUAL UNIVERSITY IS
THE
GREATEST THING I HAVE
SEEN OUR
ASSOCIATION DO."**

—BRUCE WARD
WARD BROTHERS INSURANCE
HUMBLE, TEXAS

The Big "I" Virtual University is a new model of learning for the insurance industry. Our "just-in-time" (rather than "just-in-case") method of learning allows you and your staff to do research and take online courses 24 hours a day, 365 days a year from office or home...education where you need it and when you need it. The Virtual University and its Schools of Insurance, Business and Technology provide the following resources:

- Research Library...your one-stop reference library
- Classrooms...the best online courses in the business
- "Ask an Expert" Service...the industry's best minds
- Student Lounge...communicate with your peers
- Bookstore...books, manuals, videos, and more

Through a unique partnership with our state associations and selected third-party vendors, we are able to provide you with the most comprehensive and integrated learning system in the industry.

Be sure to sign up for our free bi weekly email newsletter, *The VUpoint*.
Go to <http://www.iiaba.net/VU/Newsletter/Subscribe.htm>

- evaluation
- planning
- sales
- customer service
- ordering information
- additional resources
- designation programs
- our partners

about best practices

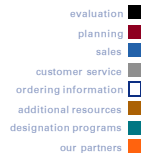


The Independent Insurance Agents & Brokers of America provides you with the tools you need to reach your agency's full potential. Through our Best Practices catalog of products, you will develop a strategy that sharpens your competitive edge while assembling an overall agency management plan to maximize prosperity and profits.

Take a proactive approach to the success of your agency with Best Practices products that help you understand the past, analyze the present and formulate a strategy for the future. Whether you are just beginning the journey to agency awareness or already well on your way to efficient management, Best Practices has something to offer you.

Imagine your potential, build an agency plan to reach your goals, and cultivate an agency environment ripe with prosperity and profits. Best Practices will guide you every step of the way.

- Evaluate your agency's performance and establish the framework for a high-valued agency with continued growth
- Plan a strategy that focuses on profitability, growth, staffing and survival
- Energize your agency's customer service to exceed the competition
- Identify your sales management abilities and achieve record sales utilizing proven methods





evaluation



2001 Best Practices Study

Acquire benchmarking figures and learn business practices used by 30 top organizations that are scored and ranked by account retention rates, revenue growth, productivity, profitability, and financial stability. A must-have for any agency.

Product Code: 7002D
Price: \$59.95



2003 Best Practices Study Update



Obtain the most recent benchmarking figures for the Best Practices Study along with all the data needed to update or create yearly comparisons for accurate tracking of your agency's performance.

Product Code: 7002F
Price: \$49.95 (hardcopy)
or \$39.95 (electronic)

Tool Set—2001 Study & 2003 Best Practices Study Update

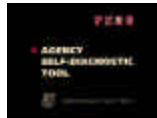
Product Code: 70021B • Price: \$89.95



Five Practices of Highly Effective Leaders

Skip the trial and error approach and profit from the experiences of 18 leaders who successfully guided their agencies through periods of change and uncertainty. Provides many useful worksheets to diagnose your agency's current performance and help you develop plans for the future.

Product Code: 077A
Price: \$50.00



Agency Self-Diagnostic Tool

Do you want your agency to be the best it can be? Learn how to maximize your agency's value. This comprehensive easy-to-use workbook provides the information, tools and resources you need to evaluate current agency performance and develop an action plan to help you achieve your objectives.

Product Code: 0721
Price: \$30.00

- evaluation
- planning
- sales
- customer service
- ordering information
- additional resources
- designation programs
- our partners



Best Practices of Crisis Management—A Step-By-Step Business Recovery Planner

This valuable tool includes both a written guide and an interactive CD designed to enable you to create an in-house, fully customized plan to lead your agency step-by-step through the crisis recovery process. An important resource for both your agency and your clients.

Product Code: 70081
 Price: \$99.95



The Practical Agency Planner

Strive for success, profitability and a secure retirement with confidence by increasing profits through tax savings, planning for perpetuation and adding significantly to the potential sales price of your agency.

Product Code: 2322
 Price: \$79.95



Best Practices in Business Perpetuation and Management Succession

If your agency is about to go through the perpetuation process, gear up for the challenge by adding this powerful tool to your arsenal. Provides specific steps, practical tools and valuable resources for the successful and profitable transfer of agency ownership.

Product Code: 7012A
 Price: \$25.00

- evaluation
- planning
- sales
- customer service
- ordering information
- additional resources
- designation programs
- our partners



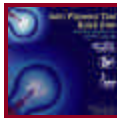
planning



Joint Agency/Company Planning Tool

Learn how to build a collaborative planning relationship with your companies to further your mutual success. Develop long-term relationships beneficial to both parties and attract and develop new partnerships.

Product Code: 076A
Price: \$30.00



Joint Planning Tool Quick Step

The Joint Planning Tool Quick Step was designed to accelerate agency/company planning. Developed jointly by agents and companies in partnership with IIABA's Council for Best Practices, this easy-to-use Excel spreadsheet program is designed to help you establish and monitor collaborative planning relationships with your insurance partners.









Product Code: 7003B
Price: \$79.95 (electronic only)



Guide to Producer Contracts

The maze of legal jargon contained in producer contracts is finally explained in this concise guide that also contains sample contracts. A must-have for principals, agencies and their attorneys.

Product Code: 70231
Price: \$29.95

-  evaluation
-  planning
-  sales
-  customer service
-  ordering information
-  additional resources
-  designation programs
-  our partners



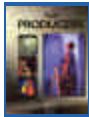
sales



Best Practices of Leading Sales Organizations in the United States

Are viability and value reaching their full potential in your agency? Through an analysis of the leading sales organizations in the U.S., learn the practical ideas, various options and specific steps needed to enhance and maximize your agency's sales performance.

Product Code: 074D
Price: \$20.00



Top Producers: Discover, Train, Reward

Add super sales power to your agency. This guide will lead you through the steps of finding, hiring, training, compensating and managing great performers. Don't hire another producer without this guide! Includes Guide to Producer Contracts (a \$29.95 value).

Product Code: 7021A
Price: \$89.95

customer service



Customer Service Made Simple



From marketing for growth to online services, this guide lists priorities/tactics to help you set and achieve your customer service goals. Learn how to lead your team to better evaluate customer feedback, increase the number of policies written and significantly improve account retention and development.

Product Code: 7009
Price: \$29.95 (hardcopy)
\$19.95 (electronic)



- evaluation ■
- planning ■
- sales ■
- customer service ■
- ordering information
- additional resources ■
- designation programs ■
- our partners ■



ordering information

Order by Web:

Best Practices is on the Web! To download the Best Practices order forms, view product samples or utilize interactive Quick Checks, visit www.independentagent.com and click on the "Best Practices" button.

Order by Fax:

Simply fax the Best Practices Tools order form to (703) 683-7556. See above for information on how to obtain order forms.

Order by Phone:

Call toll free, (800) 221-7917, Monday – Friday, 9:00 a.m. – 5:00 p.m. Closed all major holidays. Please have your MasterCard, Visa or American Express and the Best Practices product code number available when calling.

Payment Methods:

We accept MasterCard, Visa and American Express, checks and money orders. Sorry, no COD or invoicing.

Delivery Information:

All materials will be shipped within three business days of receiving the order unless a "rush order" is requested. Large orders are mailed via UPS Ground Service, so please supply a street address as delivery cannot be made to Post Office boxes.

Rush Orders:

Rush orders must be received by 2:00 p.m. EST for next-day service and an additional fee of \$20 will apply. A \$5 fee will apply when the rush order is shipped with a customer supplied Airborne Express or FedEx account number.

Our Guarantee>Returns:

We stand behind our products and will refund the purchase price if you are not completely satisfied. All materials must be received in their original condition within 30 days of purchase. Send returns to: IIABA, 127 South Peyton Street, Alexandria, VA 22314 Attention: Best Practices Returns.



Electronic Delivery available



CALL: (800) 221-7917



FAX: (703) 683-7556



MAIL: 127 South Peyton Street
Alexandria, VA 22314

- evaluation
- planning
- sales
- customer service
- ordering information
- additional resources
- designation programs
- our partners

additional resources



2003 ABIA Study of Leading Banks in Insurance

Learn how the bank-insurance industry is developing, what strategies banks are pursuing, and what practices and approaches are producing successful bank-insurance programs.

To order, call (800) BANKERS.

ABIA Member Price: \$50.00
Non-Member Price: \$250.00

IIABA Member Price: \$50.00
call (800) BANKERS
and ask for #3002174

2002-2003 Owner, Executive & Producer Compensation Survey

This study breaks out producer compensation by lines of business plus enables you to compare your agency with others of similar size on a national level and in your region.

To order, call (800) 221-7917.

IIABA Member Price: \$99.00
+ state tax
+ \$6.00 shipping/handling

2003-2004 Non-Producer Compensation & Benefits Survey

This study provides an examination of non-producer compensation, benefit practices and trends across the country.

To order, call (800) 221-7917.

IIABA Member Price: \$99.00
+ state tax
+ \$6.00 shipping/handling

Agency Performance Analysis (APA)

Ever wonder how you measure up to leading firms of equivalent size? Just compile your year-end fiscal information on a data collection diskette and the experts at Reagan Consulting will provide a succinct comprehensive analysis of your operating performance.

To order, call (404) 233-5545.

IIABA Member Price: \$250.00
annually

- evaluation
- planning
- sales
- customer service
- ordering information
- additional resources**
- designation programs
- our partners



designation programs

Associate in Insurance Production (AIP) Designation

The Elite Force Sales Training Program covers everything an insurance producer needs to know, including negotiation skills, prospecting, time management, consultative relationship building, building credibility, data gathering, and closing while reviewing several different popular sales techniques. Attend 12 days of classes (three days per quarter) adhere to the "written" requirements of the program (goal setting and monthly reporting) and earn the Associate in Insurance Production (AIP) designation administered through IIABA.

This new sales school is offered through several IIABA state associations and the national association. For more information contact your IIABA state association or the Big "I" national association at (800) 221-7917.

Accredited Financial Services Representative (AFSR)

This new designation program is designed to train Financial Services Representatives on their role in a P&C agency. In order to receive the designation, agents must complete the following classes:

- Class One: Why You're a Financial Services Rep in a P&C Agency and How to Make It Really Work
- Class Two: Business Development: How to Market Your Services to Increase Your Business
- Class Three: Product Training to Keep You on the Cutting Edge
- Class Four: Successful Strategies of Client Services
- Class Five: Best Practices Guide to Agency Business Processes and Workflows

This new designation program is offered through several IIABA state associations. For more information contact your IIABA state association or the Big "I" national association at (800) 221-7917.

- evaluation
- planning
- sales
- customer service
- ordering information
- additional resources
- designation programs
- our partners



The Independent Insurance Agents & Brokers of America would like to thank our company partners for their support of the Best Practices program.

Allstate Insurance Company



America First Insurance



Central Insurance Companies



Chubb Group of
Insurance Companies



Citizens Insurance Company
of America



CNA

Colorado Casualty



Fireman's Fund
Insurance Company



GoAmerica Auto Insurance



Golden Eagle Insurance



The Hanover Insurance Company



The Hartford

Hartford Steam Boiler



Hawkeye-Security Insurance



Indiana Insurance



Main Street America Group



MetLife Auto & Home



Montgomery Insurance



Ohio Casualty Group

OneBeacon Insurance



Peerless Insurance



Safeco Insurance



Selective Insurance



The St. Paul Companies



Travelers Property Casualty



Zurich North America



Independent Insurance Agents & Brokers of America, Inc.

127 South Peyton Street

Alexandria, VA 22314

(800) 221-7917

(703) 683-7556—fax

www.independentagent.com

