

# IAAC

THE AGENCY FOR INDEPENDENT AGENTS

# OPERATIONAL CONSULTING SERVICES

IAAC is the Member  
Services Division  
of Big I NY

Running an independent insurance agency can be challenging. Not only are you ensuring customers have the right coverage options to protect what matters most, you need to operate your business efficiently while staying compliant and achieving maximum profitability. That's where IAAC's Operational Consulting Services can help.

Our experienced team will work one-on-one with your agency to evaluate your current operations, uncover opportunities for improvement, update processes and workflows, identify red flags that could lead to E&O claims, and help you adopt new technology.

The foundation for E&O risk management is consistency, communication, and documentation. IAAC's team will help bring that to every part of your operations.

**Don't wait; get started with your E&O website review and FREE Operational Agency Evaluation today.**



**Cindy Scharf**

Agency Consultant & Corporate  
Project Manager  
cscharf@biginy.org  
800.962.7950 EXT: 232

## Our Services

### ✔ E&O Website Review

Agency websites are used to support E&O claims. Have your insurance agency website reviewed by an approved auditor to see what potential language could be used against your agency in an E&O claim.

### ✔ Virtual E&O Audit

Westport E&O policyholders can potentially earn a premium credit of up to 10% for up to 5 years. Not a Swiss Re policyholder? Let's see if we can earn you a premium credit! Review your operations to reduce E&O exposure, improve customer service and increase sales opportunities.

### ✔ Operational Agency Evaluation

Evaluate agency workflows and operational procedures with a FREE customized plan mapping to agency resources.

### ✔ Technology For Your Agency

Have questions about your agency tech needs? We can help your agency with adopting new technology or maximizing what's in place. Not sure where to start? Use our Contact Form to start the conversation.

**BigI NY.org/Consulting**