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Becker Seeks More Education To Bolster ASCnet Membership

By LAURA MAZZUCA TOOPS

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As incoming chair of the Applied Systems Client Network, Lisa Parry Becker is targeting more educational opportunities for members and increased engagement at all levels.

Ms. Becker, vice president of William B. Parry & Son, Ltd. in Langhorne, Pa., is a fifth-generation agent at a 100-year-old family business. She is responsible for sales and marketing, as well as handling personal and commercial accounts.

She has also co-chaired the Real Time/Download Campaign (www.getrealttime.org) since the industrywide initiative was formed in early 2007.

She joined ASCnet in 1999 through her local chapter. In 2003, she became part of the ASCnet Interface Committee—now the ASCnet Industry Solutions Committee—and is a past chair. She joined the ASCnet board in 2008.

In an exclusive interview, Ms. Becker described her own agency's successes with automation and outlined her plans for ASCnet.

Q: You're a well-known proponent of real-time use. How has real time and automation in general helped in your own agency over the past year?

Lisa Parry Becker: We're so busy that we're actually hiring. We write a lot of Main Street businesses and contractors, and in Pennsylvania, contractors are now required to submit certificates of insurance when they are just bidding a job.

Our agency has never had a commercial lines CSR, so to meet this need we created the position and hired a person in January. By training her on real time, we were able to cut training time in half. She was handling billing and claims inquiries in a week, and doing rating in six weeks.

Once you're fully functional with your automation, you can't gain any more efficiencies, so you're freed up to pursue more new business. This is where we're at now with our Applied Systems' TAM system. One of our part-time personal lines CSRs is retiring this year, and her replacement will be a full-time employee.

Q: Your agency has been using Applied Systems' products for more than 20 years. How has the product evolved over the years?

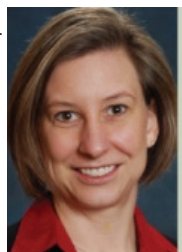
Ms. Becker: It has definitely improved. In the past, the updates were time-consuming. Now they're good—stable. We're currently still running the TAM system, but hope to upgrade to Epic sometime next year.

Many of these product improvements are a direct result of ASCnet involvement. ASCnet was heavily involved with the development and rollout of claims download. Real time is another example.

Q: ASCnet is launching an agents' "21-day challenge" for getting the most out of their Applied Systems' products. How will the program work?

Ms. Becker: As part of the Real Time/Download Campaign, we're encouraging agents to take the challenge, based on the premise that it takes 21 days of repetition for someone to develop a new habit. We spent the summer breaking down the steps into essentially a four-week program, giving agencies the steps they need to take each week. The program is designed for users at all levels.

- Week One involves setting up the system to conduct inquiries with their primary carrier.



"I'd like to improve our ability to connect with other people by getting them the education they need—where and how they want it, and getting more people involved..."

Lisa Parry Becker, Chair Applied Systems Client Network

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- Week Two shows how to set up the system with the office and the rest of the agency's carriers.
- Weeks Three and Four deal with rating workflows.

The challenge part comes with the number of team players involved in the process. It can be conducted with a few key players or the whole agency, and agencies can actually compete with each other.

The program will also be rolled out to the carriers, who can add their own spin to the competition—such as incentives for goals achieved. Successful completion of the challenge occurs when an agency is using all of the real-time functionality available with all of their carriers and real time is having a positive impact on the agency's bottom line.

From the campaign's research, we know that real-time usage is saving agencies an average of three weeks of time per year, per employee.

Q: What are your primary goals as ASCnet chair?

Ms. Becker: First, I'd like to work on providing members with education on how to improve their workflows, which will allow them to meet carrier requirements and grow.

Second, I'd like to help them discover the untapped capabilities of their systems, such as reporting features, which can help agents upsell their existing customers. My goal is to help them go beyond the basics.

Most of that will come through more educational programs. This year, more than a third of TENCon classes [at ASCnet's annual conference] were new, and that's something that we'll continue to develop—classes delivered the way our members want to receive them.

Our webinar series has been very successful, and we will do more of that in the coming year, along with shorter, more intensive seminars as an alternative for those who aren't able to come out to a convention or attend a local chapter meeting.

We're also trying to attract and engage younger members, perhaps through the smaller structure of task forces and subcommittees.

To summarize, I'd like to improve our ability to connect with other people—by getting them the education they need, where and how they want it, and getting more people involved, whether it's at the chapter, regional or national levels.

Laura Toops is Editor of *American Agent & Broker*, a member of Summit Business Media's P&C Magazine Group, which includes *National Underwriter*. She may be reached at ltoops@sbmedia.com.

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