IIANC Technology Consulting Services

www.iianc.com/technology

Agency Automation Audit

Are you using your agency management system and other technologies to their fullest potential? Are you looking for ways to reduce steps and create better efficiency within your current workflows? Our agency automation system audit examines the current usage of your management systems to find better efficiencies and create more capacity for your staff. Each audit comes with a final report detailing your current workflows and recommending practical suggestions for improvement.

Agency Management System Training for Staff

Provide training for most agency management systems, comparative raters, social media tools, cyber liability prevention and other technology services.

Management System Selection & Implementation

If your agency is evaluating a new management system or looking to purchase your first system, George can help you review your current and future needs and match them to the system that best benefits your agency. His expertise in management systems and agency operations makes him a valuable resource in this important purchase decision. He can also help with implementation and setups to make sure your agency is ready for the transition.

Cyber Security Training for Staff

Educate your staff on the importance of cyber security and tips they can use to help prevent a potential data-breach. In this session, employees will be trained on detecting phishing attempts, bogus phone calls, on-site security, password creation, along with other methods to help secure confidential information.

Written Cyber Security Plan for Your Agency

Assist the agency in preparing a written security plan to help protect the agency from a potential data-breach. Establishing a risk analysis, incident response plan, and a written security plan that focuses on physical, technical, and administrative measures.

George Robertson, CISR | IIANC Technology Consultant

George Robertson has over 25 years of experience in the insurance and technology industry, with 12 of those as a fellow independent agency owner. This means he knows first-hand the challenges you face when trying to improve revenue and more efficiently use staff and agency management systems. His knowledge of insurance automation comes from years of study and working for some of the leading automation vendors in the industry as well as other leading technology providers. George is also well-versed in the latest social media tools and website advances and can help you implement those into your agency's marketing efforts. George is a member of the IIABA Agents Council for Technology (ACT) Steering Committee and speaks around the country for industry associations and user groups on technology related issues.

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