



"Our steady, healthy growth is the direct result of superior Service combined with super standard coverage."

—H.O. Hirt

ThisWeek@ERIE

In the March 29 issue, read these stories:

Reminder: Last Day to Promote J.D. Power is March 31

Maryland Workers' Compensation Rate Change

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Embrace Technology: It Pays Off

For Agents **Doug** and **Debbie Dier**, technology is at the core of their business success. Starting with ERIE tools like DSpro® Web that allow them to quote three lines of business in just a few minutes, embracing technology as a means to better serve Customers is a familiar part of the story for the northern New York agency.

For example, A. T. Matthews & Dier went paperless 13 years ago and they haven't looked back. They've also adopted additional technologies to create and enhance work flows to improve efficiency.

Valuing excellence in agency operations and service extends to staff members as well.

When hiring, Doug and Debbie purposefully seek out individuals who embrace change and want to continuously improve the level of service they provide. The agency structure even includes a technology team dedicated to keeping the agency up-to-date with the latest advancements.

"You have to face technology advancements head on in order to thrive in today's market," says Doug.

The husband-and-wife team has also spent considerable time shaping the future of ERIE technology by sharing their knowledge and expertise through the Technology Task Force and ERIE pilot programs.

Doug and Debbie recently shared their insights on how embracing technology—and an ongoing working relationship with ERIE—has contributed to positive outcomes for their business as well as fellow ERIE Agents.

Continued

Agency

A. T. Matthews & Dier in Watertown, New York

Doug Dier

Agency principal, former Technology Task Force Agent

Debbie Dier

Director of operations, agency management system liaison to ERIE

What they're doing

Embracing technology to market and sell more policies and provide faster service.

What's the benefit?

With the help of technology, the agency is writing more personal lines apps in a month than they used to write in a year. Their overall agency growth was 34 percent in 2015; they are

ranked #21 on the Personal Lines Elite list; agency also qualified for Allure last year and enjoy a steady stream of referrals.

Why embracing technology matters

The landscape is changing and technology enables Agents to keep pace with our mobile society and the competition. Consumers want to frequent businesses that can service them in the way they want—whether that's email, text messaging, online or in person.

Number of agency staff members

11; eight Agent producers and three team members dedicated to agency operations and technology.



Doug Dier



Debbie Dier

Buzzword

J.D. Power Award

March 31 is the last day to promote ERIE's J.D. Power recognition. All promotional efforts must stop and materials promoting the award must be removed from agencies, including references in voicemail greetings and email signatures.

Embrace Technology: It Pays Off

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How did going paperless change your agency?

Doug: Quick storage and retrieval of documents has had a huge impact. Instead of putting a Customer on hold to retrieve a paper file, we can immediately see policy information, answer questions or forward documents. We can also offer coverage enhancements and focus on account rounding and cross-selling.

Debbie: Simply put, technology makes us more efficient, giving us more time to talk to Customers about insurance. With policy information at our fingertips, we can see what coverage a Customer has, update system notes and promptly make any

needed policy changes. It helps us serve Customers better and faster.

You've participated in many ERIE pilot programs. Why?

Doug: We were involved in the pilots for eSignature, C-LION, DSpro® Web and ErieSecure Home™ because together we want to be better than the competition. We want to provide ERIE with good information and Agent feedback in order to develop technologies that help us all win in the marketplace.

Debbie: Pilots allow us to give valuable feedback and share our knowledge. For example, ERIE listened to our suggestions

for quoting scheduled items in ErieSecure Home™. We all have that capability now, thanks to collaboration.

In what other ways do you collaborate with ERIE?

Debbie: One example was when we hosted an IT Employee agency visit. A group of Employees came to our agency and we reviewed every line of business, focusing on data exchange with ERIE and how it affects our agency. They came away understanding why we ask for certain capabilities and how we use the tools they provide.

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Agents to ERIE IT: We've Come a Long Way

“One team, one focus” was the theme of the latest town hall for ERIE's technology team.

True to this emphasis, the all-hands event welcomed hundreds of IT team members, ERIE's Enterprise Portfolio Management Office (EPMO), business leaders who partner with IT on strategic initiatives—and four ERIE Agents.

Columbus Agent **Greg Carr**, Harrisburg Agent **Jim Murdoch** and New York Agents **Doug and Debbie Dier** all shared their thoughts on working with IT as part of a panel discussion that was the highlight of the forum. As longtime pilot agencies among the first to try new systems and enhancements and current or former members of the Technology Task Force, the panelists shared a deep interest in IT's success.

Ann Zaprazny, senior vice president, East Region, moderated the discussion, which took place February 11 at the Bayfront Convention Center in Erie.

Panel topics included the improved collaboration between ERIE and its Agents; a “day in the life” of an ERIE agency, including adapting to the individual communication preferences of today's Customers and going



Ann Zaprazny, SVP, East Region (center), moderated a panel discussion with four ERIE Agents at a recent IT event. Panelists included, from left, Agents Greg Carr, Jim Murdoch, and Doug and Debbie Dier.

Greg served as the 2015 Combined Task Force Moderator and is former chair of the Technology Task Force; Jim is the current Technology Task Force chair; and Doug is a former Technology Task Force member.

paperless; serving as an ERIE pilot agency; technology opportunities on the horizon, and more.

“Agents are more relevant, not less, in a digital world,” said **Bob Ingram**, executive vice president, IT, in his keynote address. “The personal touch that **H.O. Hirt** talked about never goes out of style.

“Our challenge is how to do both—be digital and 24/7, and keep Agents at the core of owning the Customer relationship,” continued Bob.

The program also included award presentations for team members making significant contributions to IT's success. Among them was **Greg Carr**. Greg was honored with the “ERIE on the Jersey” Award for his leadership and teamwork from within ERIE's agency force (see back cover).

Agent panelists and IT and ERIE business leaders enjoyed individual time with attendees during a reception afterward. ●

Boosting Networking through Social Media

Agency
Insurance Solutions from Amber, Lafayette, Indiana

What she's doing
Engaging followers on Facebook* while building referral relationships

Results
52
Current growth up 52 percent

41
New PIF up 41 percent

54
Total DWP up 54 percent



Amber Fields

Amber Fields, owner of Insurance Solutions from Amber in Lafayette, Indiana, hit the ground running when she became an ERIE Agent five years ago. She knew that she needed to get her name out there in a unique way so Customers and prospects would remember her. She also wanted to find potential partners to team up with.

To start working toward her goal, Amber created a networking group for local professionals, Professional Leaders and Networking Team (P.L.A.N.T.), and built her social media presence on Facebook.

She has since branched out and joined other networking groups, coming up with creative ways to expose people to her agency and get referrals from other professionals. Here's what Amber's doing.

Building relationships

Amber has been active with networking groups and her local chamber of commerce for years. More recently, she began partnering with area real estate agents and mortgage lenders to help drive referrals for both businesses.

When a Realtor sells a house, Amber wants her agency to be the one that the real estate agent suggests to the new homeowners. She's expanding her network through networking groups and one-on-one coffee meetings where she explains how she can help promote the real estate agent via her agency's Facebook page.

"My goal this year is to widen my network and work on building relationships with other Realtors that I don't know," Amber said. "I like the opportunity to sit down and talk to someone about how we can help each other out."

One of the ways Amber supports real estate agents is by liking their Facebook pages and sharing their posts. That way, everyone receives more exposure.

Liking and sharing

Staying active on social media is crucial to Amber's success. She takes advantage of social media to promote not only insurance-related posts, but also community-focused posts she thinks her followers will engage with.

"The goal is to get our posts in front of as many eyes as possible and keep people informed of things going on," Amber said. "We share local events, festivals and community events, not just insurance news. We've seen really good engagement from community members, which is awesome, because we know people are being exposed to our brand as well."

This practice is the reason some of her most well-received marketing campaigns have been successful.

Getting creative

Amber has come up with some interactive campaigns to drive brand awareness, one of which she's beginning soon with Realtors from her networking group.

During the week, the agency will promote three home listings on Facebook that have Sunday open houses. Viewers have to guess which open house Amber will show up at. A \$50 gift card will be given away to a random winner from the correct guessers. Amber has enough real estate agents involved to continue this campaign for five more weeks and hopes to get more agents involved.

In the past, Amber did something similar when she initiated her "Find Amber" campaign. She used radio and Facebook® advertising to promote it and encouraged people to find her around town driving the agency-wrapped car. Locals who found her were entered into a weekly drawing. This particular campaign was great for branding and helped increase awareness of Amber and her agency—over 150 community members participated. ●

Amber's Tips for Engagement

Network, network, network

Share community events and posts

Follow a business's page

Like and share other business's posts for optimal exposure

Work together when you can

Embrace Technology: It Pays Off

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It also started a relationship that continues today as we share details on how data is received into our agency management system.

Doug: Through my participation on the task force and other opportunities to work with ERIE, we've helped shape the systems and programs ERIE provides. We've come a long way since the time when Agents first started asking for ease of doing business. It's been great to be a part of that process.

How do relationships play a part?

Doug: I have been involved with agent advisory groups with other carriers and there just isn't the openness ERIE and its agency force shares. Like being invited to the IT Town Hall meeting last month; that just doesn't happen elsewhere. We were able to share our insights, make an impact and say "thank you" for all the work accomplished. We cherish the relationship that has been built over the years.

What advice do you have for other Agents?

Doug: Don't be afraid of change. Technology is evolving no matter what. Accept it and make it work to your advantage—whether that's increasing your social media presence, upgrading your management system or hiring a computer technician to customize it for your agency. It will pay off for both you and your Customer.

Debbie: If you get invited to participate in a pilot, agency visit or task force, we encourage you to take advantage of the opportunity. Not only do you get to share your insights and expertise, you will learn a lot from the process. ●

[See story inside for more on the IT Town Hall.](#)

Agents in the News

He Wears ERIE on His Jersey—At the most recent IT Town Hall in Erie, Pennsylvania (see inside story), Columbus Agent **Greg Carr** of the Carr Insurance Agency received one of IT's highest honors: the "ERIE on the Jersey Award." This leadership award is reserved for those outside of IT who are modeling the behaviors and teamwork that exemplify how we all work in service to only one team—The ERIE.



Agent Greg Carr (left) accepts his "ERIE on the Jersey Award" from Bob Ingram (center), executive vice president, IT, and Keith Kennedy (right), senior vice president, IT, and ERIE co-chair of the Technology Task Force.

"This is an individual who has worked with us to achieve a better outcome and made a significant difference," said **Bob Ingram**, executive vice president, IT, at the event.

Greg, principal of Carr Insurance Agency with locations in Dayton, Ohio, and Louisville, Kentucky, most recently served as the 2015 Combined Task Force Moderator. He also served as inaugural chair of the Technology Task Force from 2007 until 2013.

"It's been a tremendous experience," Greg said of the nearly 10 years he's held leadership roles representing fellow ERIE Agents.

"I'm a better person because of it. I'm a better principal Agent because of it. And, along the way, I made some great friends...so thank you," he added.

S(no)w Problem—ERIE Agents are good at providing Customers with great service not only in the office, but out of it too. Agent **Jason Dolby**

of The Group Insurance Agency in Springfield, Illinois, was driving with his kids in the car one snowy afternoon and came across the scene of an accident: a car that had flipped over and went down a slight incline. Jason stopped and assisted the elderly driver in getting out of her overturned vehicle before emergency services arrived.

"As insurance agents, we're in the business of helping people, so I really didn't think much about it when I was flagged down by a person who had witnessed the accident," said Jason, who is the Illinois Branch representative on the Commercial Task Force. "I just saw a chance to help someone and did. I'm sure lots of my fellow ERIE Agents would have done the same thing."

Jason's DSM **Matt Arnold** wasn't surprised by Jason's helpfulness and shared some words of praise for Jason and his "above all" mentality.

"When I learned that Jason had stopped on the interstate to help, I wasn't at all surprised," said Matt. "I've known Jason since 2011, and while this certainly is the most dramatic example, I've seen a number of situations where Jason has gone out of his way to help others." ●



Agent Jason Dolby