



Welcomes You to VRC!

With

Peggy Ogren CPCU, ARM

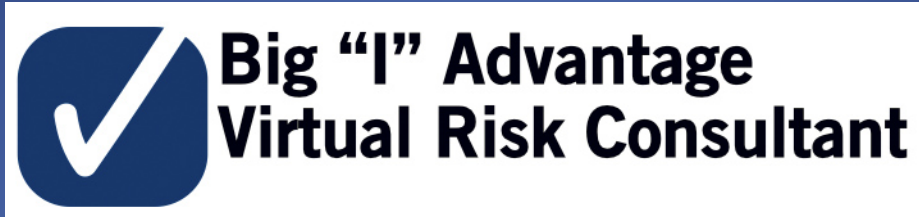
And

David Hulcher



**Big “I” Advantage
Virtual Risk Consultant**

What are the benefits of



- Increase sales through writing new classes of business and rounding accounts
- Avoid E&O claims relating to failing to identify customer exposure or offer coverage solutions
- Facilitate agency training and professionalism
- Better understand and serve your customers
 - Increased efficiency of agency operations
 - Expertise that is available 24/7

Know Your Product

- *PF&M*
- *Coverages Applicable*

Know Your Prospect/Customer

- Risk Exposure Evaluation Systems
- *Coverages Applicable*
- *Insurance Words* – Industry Glossary

Best Practices

- Risk Exposure Evaluation Systems – Surveys
- Accord™ Forms Library – Form Completion Tutorial
- Risk Exposure Evaluation Systems – E&O Coverage Checklist/
File Documentation

Sell Yourself

- *Business Building Letters*
- e-Marketing

Find the Market You Need

- The Insurance Marketplace

Explore Emerging Industries

- The Insurance Marketplace Cybercast

Provide Agency Training Resources

- *PF&M* – Tutorial Format

How much does the VRC cost?

- Products similar to the VRC cost thousands of dollars. Big “I” members get the VRC at an incredibly low cost:

Agency Size:	Annual Subscription Cost:	Four-year Subscription Cost:
1 to 15 Agency Users	\$250	**\$750**
More than 15 Agency Users	\$500	**\$1500**

How to purchase?

Step #1: Visit www.iiaba.net/VRC

The screenshot shows the homepage of the Independent Insurance Agents & Brokers of America. At the top, there is a navigation menu with links for HOME, Agency E & O, Big I Markets, Career Center, InsurBanc, Virtual University, Trusted Choice, InVEST, IA Magazine, and ACT. The main header features the Independent Insurance Agent logo on the left and the Trusted Choice logo on the right. Below the header is a navigation bar with links for Join, Member Resources, Education, Events, Government Affairs, News, About Us, Legal Advocacy, Consumer Information, and Other States. A search bar and a 'FIND AN AGENT' button are also present. A red box with the text 'Click on this button!' points to the 'CLICK HERE TO PURCHASE' button in the 'Big 'I' Advantage Virtual Risk Consultant' section.

MEMBER LOGIN user name password **login** remember user id **SEARCH** **go** **FIND AN AGENT**

Join Member Resources Education Events Government Affairs News About Us Legal Advocacy Consumer Information Other States

Forgot username or password? Wednesday, 06/09/2010 [Email](#) [Print](#)

BIG I Advantage®

Big "I" Professional Liability Program
Your Trusted Source for Insurance Agents and Brokers E&O, Available Nationwide.

Big I Advantage® Programs

- [Big "I" Professional Liability](#)
- [Big "I" Markets](#)
- [Big "I" Flood Program](#)
- [Big "I" Retirement Services](#)
- [Non-Insurance Products and Services](#)

CLICK HERE TO LOG IN

CLICK HERE TO PURCHASE

Big "I" Advantage Virtual Risk Consultant
Powered by Rough Notes

Big "I" Advantage Virtual Risk Consultant
Powered by Rough Notes

The Big I Advantage® Virtual Risk Consultant powered by Rough Notes ("VRC") is an online sales and service resource designed to help your agency better serve your customers. Using this tool will lead to increased sales by improving your staff's knowledge of a prospect's operation enabling them to better identify and cover customer exposures. The VRC will help your staff better understand the product they sell. It will also assist agency staff with preparing proposals, explaining complicated insurance terms, and most importantly documenting client files. It is truly a tool that will increase the professionalism of staff and help your agency grow while limiting your exposure to E&O claims.

Big "I" members have exclusive access to Big I Advantage® Virtual Risk Consultant. Similar products sell for thousands of dollars. Big "I" members enjoy a deeply discounted rate:

Agency Size (per state)	Annual Subscription Price	Four-Year Subscription Price (Best Value!)
Up to 15 users per agency	\$250	\$750
More than 15 users per agency	\$500	\$1,500

[To see the VRC in action, click here to experience a limited demo.](#)

If you need a telephone demo of Big "I" Advantage Virtual Risk Consultant and what is included please call Margaret Rhodes or Nancy Lynch at 877-582-9199.

Local intranet 100%

Step #2: Login using your Big "I" user name and password.

The screenshot shows the homepage of the Independent Insurance Agents & Brokers of America. At the top, there is a navigation bar with links: HOME, Agency E & O, Big I Markets, Career Center, InsurBanc, Virtual University, Trusted Choice, InVEST, IA Magazine, and ACT. The main header features the Independent Insurance Agent logo on the left, the organization's name in the center, and the Trusted Choice logo on the right. Below the header is a red navigation bar with a 'MEMBER LOGIN' section containing input fields for 'user name' and 'password', a 'login' button, a 'SEARCH' section with a 'go' button, and a 'FIND AN AGENT' button. A secondary navigation bar below that lists various categories like 'Join', 'Member Resources', 'Education', 'Events', 'Government Affairs', 'News', 'About Us', 'Legal Advocacy', 'Consumer Information', and 'Other States'. The main content area has a date 'Wednesday, 06/09/2010' and a link for 'Forgot username or password?'. Below this is a section for 'Big I Advantage Virtual Risk Consultant' with a 'Login in here!' button highlighted in a red box. There are also 'Cancel Registration' and 'Register' buttons, and a 'View cart' link. The main heading for the VRC section is 'The Big "I" Advantage Virtual Risk Consultant Powered by Rough Notes', with 'Forgot username - Click here!' highlighted in a red box. Below this is a paragraph describing the VRC tool and a bulleted list of its features.

MEMBER LOGIN user name password login SEARCH go FIND AN AGENT

Join Member Resources Education Events Government Affairs News About Us Legal Advocacy Consumer Information Other States

Forgot username or password? Wednesday, 06/09/2010

Big I Advantage Virtual Risk Consultant **Login in here!**

Cancel Registration Register View cart

The Big "I" Advantage Virtual Risk Consultant Powered by Rough Notes

Forgot username - Click here!


The Big "I" Advantage Virtual Risk Consultant powered by Rough Notes ("VRC") is a powerful online client service resource tool that no Big "I" member should be without. VRC has useful information for all positions in the agency from the agency principal to the CSR and will increase the professionalism of the agency, leading to increased sales. Agency staff will be more knowledgeable about client/prospect operations and the VRC's commercial and personal lines risk exposure analysis process offers a systemic approach to:

- Understanding the client's operation with overviews for more than 650 business classes and personal lines risks
- Identifying client exposures with customizable client surveys/questionnaires,


- You can also email logon@iiaba.net for your user name and password or get setup.

Step #3: Select "Register" button.

HOME Agency E & O Big I Markets Career Center InsurBanc Virtual University Trusted Choice InVEST IA Magazine ACT



Independent Insurance Agents & Brokers of America



Bill's Info | logout SEARCH go FIND AN AGENT

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Wednesday, 06/09/2010

Big I Advantage Virtual Risk Consultant

[Cancel Registration](#) [Register](#) [View cart](#)

The Big "I" Advantage Virtual Risk Consultant Powered by Rough Notes

The Big "I" Advantage Virtual Risk Consultant powered by Rough Notes ("VRC") is a powerful online client service resource tool that no Big "I" member should be without. VRC has useful information for all positions in the agency from the agency principal to the CSR and will increase the professionalism of the agency, leading to increased sales. Agency staff will be more knowledgeable about client/prospect operations and the VRC's commercial and personal lines risk exposure analysis process offers a systemic approach to:

- Understanding the client's operation with overviews for more than 650 business classes and personal lines risks
- Identifying client exposures with customizable client surveys/questionnaires,
- Creating thorough customer proposals with information pertinent to their operation and a glossary of insurance terms,
- Prudently documenting customer files with signed coverage checklists.

Similar products sell for thousands of dollars, but by leveraging the buying power of the Big "I", members can purchase the VRC powered by Rough Notes for the below prices but clicking the "Register" button. **Make sure you are logged in as a member to purchase this subscription and take advantage of the 4 years of VRC for the price of three.**

Agency User Capacity (by state)	Annual Subscription Price	Four-Year Subscription Price (Best Value!)
Up to 15 Users Per Agency	\$250	\$750
+15 Users Per Agency	\$500	\$1,500

Step #4: Check the subscription box and "Add to Cart".

Agent. Independent Insurance Agents & Brokers of America Trusted Choice®

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Wednesday, 06/09/2010

Big I Advantage Virtual Risk Consultant View cart

Previous Add to cart

Your Information

* **First Name**  Look up other individual

* **Last Name**

* **Email**

* **Agency or Business Name**

Input fields with an asterisk (*) are required.

In order to purchase a subscription and see the purchasing options below you must first be logged in as a member. If you don't know your user ID and Password click on the "Forgot username or password?" link above.

Line Items

Agency Annual Subscriptions

Buy	Qty	Description	Member Price	Nonmbr Price
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Annual Subscription <i>(For agencies with 15 or fewer employees)</i>	\$250.00	\$0.00
<input type="checkbox"/>	<input type="text" value="1"/>	Annual Subscription <i>(For agencies with over 15 employees)</i>	\$500.00	\$0.00

Agency Multi Year Subscriptions

Buy	Qty	Description	Member Price	Nonmbr Price
<input type="checkbox"/>	<input type="text" value="1"/>	Four Year Subscription for the price of three <i>(For agencies with 15 or less employees)</i>	\$750.00	\$0.00
<input type="checkbox"/>	<input type="text" value="1"/>	Four Year Subscription for the price of three <i>(For agencies with over 15 employees)</i>	\$1,500.00	\$0.00


Previous Add to cart

Select subscription option!


Add to cart!

Step #5: "Check Out".

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Independent Insurance Agents & Brokers of America



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Wednesday, 06/09/2010


Shopping Cart

Reg Info	Name	Description	Line Items	Total
Delete Edit	Bill Smith	Big I Advantage Virtual Risk Consultant	(1) Annual Subscription (For agencies with 15 or fewer employees) @ \$250.00 each	\$250.00

Cart total: \$250.00


Please be sure to select the Checkout option to complete the registration process even if there is no cost. Once the registration is complete you will receive a confirmation email.

[Add other individual](#) [Continue Shopping](#) [Checkout](#)




**Select
"Checkout"!**

Independent Insurance Agents & Brokers of America, Inc.
e-mail: info@iiaba.org



127 South Peyton Street • Alexandria, VA 22314
(800) 221-7917 • (703) 683-7556 (fax)




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Step #6: Enter credit card information and click "Purchase".

HOME Agency E & O Big I Markets Career Center InsurBanc Virtual University Trusted Choice INVEST IA Magazine ACT



Independent Insurance Agents & Brokers of America



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[Join](#) [Member Resources](#) [Education](#) [Events](#) [Government Affairs](#) [News](#) [About Us](#) [Legal Advocacy](#) [Consumer Information](#) [Other States](#)

Wednesday, 06/09/2010

Payment Information

(optional) Send a copy of this ecommerce transaction receipt to the following email addresses:

* Separate multiple email addresses with a comma.
** The registrant will automatically receive a copy.

Your total amount is \$250.00.

Name on card

Card Type

Card Number


Expiration Date /

Note: Charges to your credit card will appear as 'Independent Ins Agents and Brokers of Am' on your monthly statement.

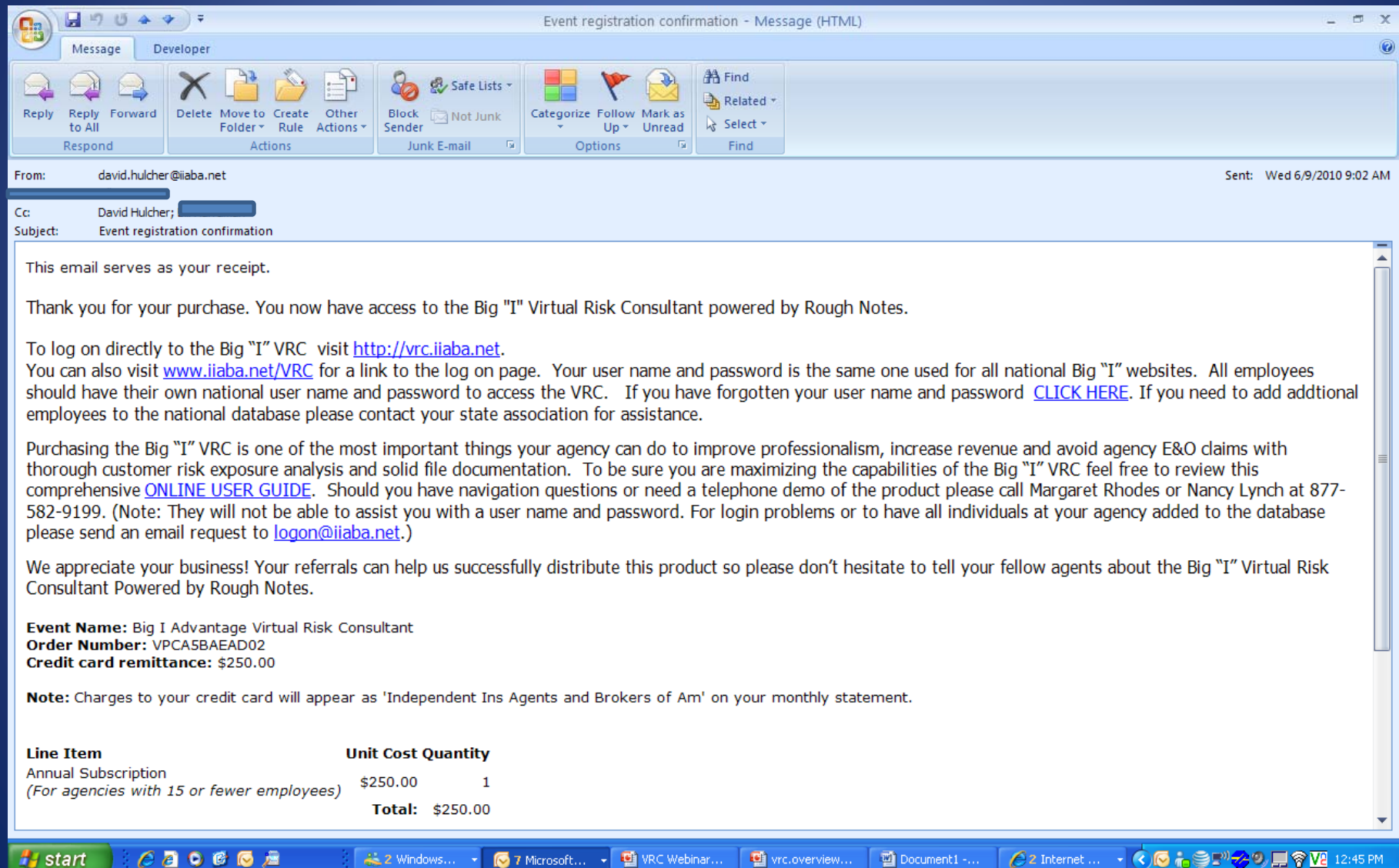
Please only click the purchase button once. Clicking it more than once will result in multiple charges.

[Previous](#) [Purchase](#)

Select
"Purchase"!



Step #7: Purchase confirmation email.



Event registration confirmation - Message (HTML)

Message Developer

From: david.hulcher@iiaba.net Sent: Wed 6/9/2010 9:02 AM

Cc: David Hulcher; [REDACTED]

Subject: Event registration confirmation

This email serves as your receipt.

Thank you for your purchase. You now have access to the Big "I" Virtual Risk Consultant powered by Rough Notes.

To log on directly to the Big "I" VRC visit <http://vrc.iiaba.net>.
You can also visit www.iiaba.net/VRC for a link to the log on page. Your user name and password is the same one used for all national Big "I" websites. All employees should have their own national user name and password to access the VRC. If you have forgotten your user name and password [CLICK HERE](#). If you need to add additional employees to the national database please contact your state association for assistance.

Purchasing the Big "I" VRC is one of the most important things your agency can do to improve professionalism, increase revenue and avoid agency E&O claims with thorough customer risk exposure analysis and solid file documentation. To be sure you are maximizing the capabilities of the Big "I" VRC feel free to review this comprehensive [ONLINE USER GUIDE](#). Should you have navigation questions or need a telephone demo of the product please call Margaret Rhodes or Nancy Lynch at 877-582-9199. (Note: They will not be able to assist you with a user name and password. For login problems or to have all individuals at your agency added to the database please send an email request to logon@iiaba.net.)

We appreciate your business! Your referrals can help us successfully distribute this product so please don't hesitate to tell your fellow agents about the Big "I" Virtual Risk Consultant Powered by Rough Notes.

Event Name: Big I Advantage Virtual Risk Consultant
Order Number: VPCA5BAEAD02
Credit card remittance: \$250.00

Note: Charges to your credit card will appear as 'Independent Ins Agents and Brokers of Am' on your monthly statement.

Line Item	Unit Cost	Quantity
Annual Subscription (For agencies with 15 or fewer employees)	\$250.00	1
Total:	\$250.00	

Windows taskbar: start, 2 Windows..., 7 Microsoft..., VRC Webinar..., vrc.overview..., Document1 -..., 2 Internet..., 12:45 PM



**Big “I” Advantage
Virtual Risk Consultant**

VRC Product Demos and
Navigation Assistance
CALL 877-582-9199
Ask for Nancy Lynch or
Margaret Rhodes