

# LEADER

Electronic version available at [BigINY.org/Join](http://BigINY.org/Join)

## Your agency has made a great investment in its future!

Just a reminder that you are your agency's Key Contact (Company Administrator). This means you are our "go-to person" at your agency and we send most of the materials to you. We ask that you share them with your fellow employees.

You are also asked to keep your company roster and profile up-to-date, which is done quickly and easily in your account (we can walk you through it if needed). If you feel you're not the right person for this role, please give us a call.

### A QUICK REMINDER...

- Big I New York staff is always available to talk through the amazing aspects of your Big I New York membership! This includes finding things on our website, our products & services, education programs, and more. Please don't hesitate to reach out to us.
- Our membership year runs September 1 - August 31. Your yearly invoice will arrive in early August & can be paid online at [BigINY.org/dues](http://BigINY.org/dues) or by mail or fax.
- We are a member-driven association. Every spring you are given the opportunity to participate in our proxy vote in which the next slate of executive committee members and board of directors is elected.

- Your agency is also a member of our national association (IIABA or the Big "I"), which grants you additional benefits on a national level. If your agency is in an area with a local association, you're also a member of that and should be receiving separate information about local upcoming events and meetings directly from them.

Your Big I New York membership gives **EVERYONE** in your agency access to our extensive and exclusive member products and benefits. This includes the vast resources on our website, market programs, Trusted Choice® logo & materials, ability to subscribe to the Trusted Choice online portal, new hire training options, discounted education pricing, CE history tracking and more.

### DISCOUNTS

Access to and savings on exclusive member programs such as:

- Tailored payroll solution (Heartland Payroll)
- Industry-specific HR consulting (The Workplace Advisors)
- Remote staffing (WAHVE - Work-At-Home-Vintage-Experts)
- Endorsed online payment provider (ePayPolicy)



# LOGIN

## Make My Big I New York Your Big I New York.

Your **Big I New York account** lets you register for Big I New York education classes & webinars online, review your CE history as well as the history of your employees, print your CE certificates, manage your contact information, pay your membership dues, and access the “members only” content on our website. This is also where you’ll maintain your staff roster, update company information and add/delete/modify branch information. But first, the basics...

### Log into Big I New York Website – (BigINY.org)

- Go to BigINY.org; click “sign in.”
- Enter your Username and Password.

### Not Sure of Your Password?

- Go to BigINY.org; click “sign in.”
- Click “Forgot your password?” (below the fields)
- Enter your Email Address, and your password will be sent to you.

### How to Change Your Password

#### Individual Users

- Sign into BigINY.org
- Once logged in click on your name in the upper right hand corner, click “My Member Profile”, and then click “Password.”
- Follow prompts to enter your new password twice and then click the “Reset Password” button.

#### Company Administrators

- Sign into BigINY.org
- Once logged in you must select the user who’s password you want to change and then follow prompts to enter your new password twice and then click the “Reset Password” button.

### Create New Accounts

Each employee needs their own account. We can take care of it for you (email [team@biginy.org](mailto:team@biginy.org)) or you can do it yourself in your account:

- Sign into BigINY.org and click “account login.”
- Click on Company Roster.
- Click “Add employee to Roster” and then follow the prompts.

### Assign Additional Company Administrators

To allow another employee to maintain your company info, pay dues and/or vote then you’ll need to make them a company administrator.

- Click “Company roster” and then “Manage Company Admins.”
- Find that person’s name and click the “Add” button.

The Big I New York website is your first go-to for information & news but there are other ways you can stay connected. Our e-newsletters and e-alerts will provide you with the latest need-to-knows, and our social sites are great ways to get engaged.



[facebook.com/BigINewYork](https://facebook.com/BigINewYork)



[twitter.com/BigINewYork](https://twitter.com/BigINewYork)



[@BigINewYork](https://instagram.com/BigINewYork)





# USE

## Are You Taking Advantage of All That's Available?

We are proud that we offer such a wide array of products and services (the Benefits Index gives a high-level overview). **Plus there are all of the things that we do behind the scenes, like our tremendous legislative and carrier advocacy work.** However, we realize it can all be overwhelming!

**Start by looking at your own agency. Where could you use some help?**

### Answer Center

Have a questions, need assistance? We've done the research for you! Our online Answer Center provides **helpful resources**, frequently asked questions, regulations and legal opinions and much more. Plus our in-house "insurance geek", Tim Dodge, is just a phone call (315-432-4229) or e-mail (tdodge@biginy.org) away if you need more help.

### Consulting Services - Insurance Technical Coverage Issues and Operational Services

Running an independent insurance agency is difficult work. It's easy to feel like you are on an island by yourself, trying to handle management, operations, HR, training, sales, and strategic planning. You are not alone! We are here to help and support our members, offering hands-on consulting services. We excel beyond other insurance associations by providing one-on-one consultative services with our experienced team. Cindy Scharf is just a phone call (315-432-4232) or e-mail (cscharf@biginy.org) away if you need more help.

### Training, Education Discounts & CE Tracking

Do you have new hires or internal promotions? Our online, on-demand New Hire Training features audiovisual exercises and knowledge checks creating an interactive learning experience that is **cost-effective** and **measurable**. We also offer in-house Tailored Training options as a complement to our award-winning education classes and webinars (which are both **discounted** for members) as well as CE tracking. Do you have a future leader in your agency but don't have the time and resources to help them reach their full potential? That's where Big I NY Leadership Academy comes in. We've put together a top-notch team of expert coaches to guide and train team members to give them the tools and skills they need to be a successful agency leader. Do you have an employee ready to take their career to the next level? We offer pre-licensing classes to get them started today!

### Hiring

Big I NY's partnership with The Workplace Advisors provides our members with expert HR support tools, customized to meet the unique needs of your business. From an HR Support Plan to consulting engagements for recruiting, HR compliance, compensation, and employee engagement, The Workplace Advisors is here to help. Enjoy exclusive member pricing. WAHVE is an endorsed, cost-saving remote staffing solution and Big "I" Hires/Ideal Traits offers hiring support.

### Reducing Costs and/or Increasing Revenues

Our members earned **more than \$1.2 million** in commissions on our exclusive market access programs: a stand-alone Personal Umbrella Policy, mono-line Work Comp Program, Write-Your-Own Flood Program and Big "I" Markets Commercial & Personal Lines programs. **Exclusive member programs** are also available in everything from tailored payroll services to premium finance, HR consulting, remote staffing, and much more.

### Marketing/Branding

You are aligned with 100,000+ independent insurance agents who are promoting the brand of the independent insurance agent, **Trusted Choice®**. It's the only agent-branding program of its kind. See the Brand Guide Sheet.

# BRAND

## Live the Brand – [trustedchoice.com/agents](http://trustedchoice.com/agents)

The Trusted Choice brand is available **EXCLUSIVELY** to Big “I” members - that’s you!

Flying the Trusted Choice® logo positions you as a premiere agent and conveys trust and expertise. Think of it as a “seal of approval.”



### 1. Use the Trusted Choice® Logo

Download the logo(s) you’d like to use and add them to your business cards, letterhead, website, marketing material - wherever consumers might see. If you’d like a Trusted Choice decal for your window, just let us know, and we’ll get one out to you!



### 2. Use the Free Marketing Materials

A suite of professionally produced advertising materials (postcards, direct mail, print ads, digital banner ads) and social media graphics, blog posts, infographics, email blast articles and more.



### 3. Get Money Back for Doing the Above!

Reimbursement is available under a shared cost arrangement: Up to \$1,000 back for cobranding your marketing materials with the Trusted Choice® logo.

### 4. Sign Up for TrustedChoice.com

Exclusive access to referral subscription plans that allow your agency to create a robust profile, appear near the top of local search results and receive unlimited personal and/or commercial referrals.





# ASK

Our goal is simple: **To help you in any way we can!**

## EXECUTIVE



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## NOT SURE WHO TO CONTACT?

Try one of our general emails:

[team@biginy.org](mailto:team@biginy.org) | [edu@biginy.org](mailto:edu@biginy.org)  
[iaac@biginy.org](mailto:iaac@biginy.org)

# BENEFITS INDEX

## Information

Technical Answer Center - ext. 229  
Best Practices - ext. 218  
Government Affairs - ext. 212  
Carrier Relations & Contracts - ext. 218

News & E-Communications - ext. 224  
Membership Billing Questions - ext. 119  
Website Login Help - ext. 210

## Products & Tools

### INSURANCE FOR YOUR AGENCY

Errors & Omissions - ext. 233  
Cyber Liability - ext. 233  
Employee Benefits (Dental, Vision, Life & Disability) -  
LiDAC Broker Employee Benefits Exchange 516-482-2696  
Employment Practices Liability Insurance - ext. 233  
Retirement - 703-706-5466

### E&O TOOLS AND RESOURCES - ext. 247

Customized Training / Consulting  
E&O Loss Control Seminars  
E&O TLC Agency Audit  
Forms, checklists, sample letters, disclaimers, tools  
The E&O Report

### MARKETING & TRUSTED CHOICE® - ext. 231

*Exclusive access to brand of the independent agent*  
Free marketing materials and training, including ad customization, up to \$1000 marketing reimbursement, logo usage, social media calendars and Google Review guidance, and website review.

### OPERATIONS - ext. 231

Agency Focus  
*Agency valuation operations planning*  
Big "I" Hires/Ideal Traits  
*Hiring Support*  
Caliper  
*Personality assessment and job matching tool*  
Catalyit  
*Agency technology guidance. Catalyit.com*  
ePayPolicy  
*Endorsed online payment provider*  
Heartland Payroll  
*Endorsed "Insurance Friendly" payroll provider solution*  
Imperial Premium Financing Services (IPFS)  
*Endorsed premium financing company*  
StaplesLink  
*Discounted office supply program*  
WAHVE  
*Endorsed cost-saving remote staffing solution*  
The Workplace Advisors  
*Endorsed human resource consulting firm*

## Market Access

Personal Umbrella Policies and Home Business Insurance  
Agencies whose name starts with A - F: ext. 243  
Agencies whose name starts with G - N: ext. 221  
Agencies whose name starts with O - Z and the Virgin Islands: ext. 246  
Unsupported Work Comp (PMC Insurance Group) - ext. 231  
Flood & Excess Flood Insurance - ext. 231  
Independent Market Solutions (IMS) - ext. 233  
**Carriers:** Attune, Chubb, CNA Surety, Coterie, Foremost  
Signature Home & Auto, Hippo, JIBNA, Progressive,  
Prudent Pet, RMS Hospitality Group, Signature Home &  
Auto, SynchronoSure, and Travelers

The following are a sampling of products available via Big "I" Markets - ext. 231

### Commercial Lines Programs:

MiddleOak Worlds Apart Apartment Program & CAPSure  
Community Association Program  
Travelers Select: *PAC programs*  
CNA Small Business  
Chubb Small Business  
Bonds through Goldleaf Surety Services, LLC:  
*Contractor, Performance, Bid, Surety & Miscellaneous*

### Personal Lines Programs:

Affluent Personal Lines through Chubb and AIG  
Non-standard Homeowners, Renters, Condominium and

## Education & Events

In-House Training Options - ext. 215  
Classroom & Webinar Offerings (incl. Pre-licensing) - ext. 119  
New Hire Training - ext. 119  
Leadership Academy - ext. 226  
Local, Statewide & National Events - ext. 249  
Accessing Your Big I New York CE History - ext. 119

## Interact & Engage

NextGen - ext. 249  
InVEST - ext. 226  
Local Associations - ext. 218  
Volunteer Opportunities - ext. 218  
State & National PACs - ext. 212