



National Association of
NFU Group Secretaries

**AGM
2020**



NAGS Agents' Liaison Group Report

from Nicholas Pope, Chair of the Agents' Liaison Group



NAGS ALG Chairman - Annual Report, December 2020

A message from our outgoing Chairman, Cathy Davies

My dear colleagues and friends,

Just a few lines by way of a big thank you to the hard working and very supportive ALG team and to express my gratitude to all those who supported me during my exciting time as Chair of this fantastic group of people.

Your ALG representatives take their responsibilities very seriously investing vast amounts of time, building bridges, offering help, guidance and support to all aspects of the business in which we operate. It can be tough and yet so rewarding. Along with your NAGS Office Holders they guard your interest, to give the best outcomes for you and your businesses whilst at the same time running their own. I was proud to be elected Chairman and work with them all.

When COVID-19 struck I was with my family in the heart of New York city, things moved quickly and it was my immense pleasure to hand over the reins to my friend and your current Chairman, Nick Pope.

Nick has made massive strides already with more to come. Times are challenging, we are operating in a very different world. The products and services we offer, the systems, the technology, and our ability to continue providing excellent local service has never been more important.

Good luck and thank you to all who currently serve and my gratitude to all those who supported me, you are all amazing.

I hope you all stay safe and I hope to see you soon.

Kindest Regards

Cathy

Current Chairman, Nick Pope

What a year and where to begin? I will start with thank you.....

Thank you Cathy Davies, for your tireless efforts and enthusiasm as an ALG Delegate and Chairman and for being a great friend. I consider myself lucky to have worked closely with you throughout 2019 and nobody more than I will truly understand the time and effort you threw at the role. You deserve a more formal thank you which I hope we will be able to arrange in better times. I can't promise we will be able to dip anything in yogurt though!

Thank you ALG delegates past and present, for your voluntary work as delegates, the support you give to me and the never-ending stream of humour, usually received daily through one or other of the communication channels we use now.



Thankyou colleagues from East Midland NAGS. Some of you will but most won't realise that the comments and opinions you send to me, directly and indirectly, help me form the arguments and perspectives that I take to the ALG and ultimately to NFU Mutual. They also help to keep me grounded!

Finally, but not least, thank you to Gemma Heal and Rupert Barnes. Gemma and I assumed our roles on the same day and only a few days before COVID-19 became official. The work that followed could not have been foreseen or planned for, and I know Gemma is as equally grateful as I to have Rupert in the team who brings many years of Office Holder experience and calm! For nearly 2 full months we were locked in MS Teams meetings everyday with Agency Department and many of the other NFU Mutual "silos". Conventional ALG subjects and NAGS Office Holder subjects merged into one and we bounced from one meeting to the next as a 3-way tag team. It was tough, but without their support March April and May would have been too tough! It would be rude of me not to thank David Palmer, your new NAGS Vice Chairman. He took some tracking and catching, he was eventually successfully darted although it took a few months for the anaesthetic to take effect, after which he agreed to step up to the role! I am extremely pleased he did, and I am already grateful for his candour. I am sure you will form your own views, but I think NAGS is in very good hands. Gemma, David and Rupert are a formidable team, and we are very lucky to have them.

Some statistics....

300+ MS Teams meetings – ALG, Subgroup and ALG & Office Holder meetings since the March lockdown

2 face to face meetings (socially distanced!) – Office Holder team

95+ Agents – currently involved in ALG and ALG Subgroup meetings

7000+ emails – received into the ALG mailbox since the March lockdown.

15+ - Subgroups

The above is an indication of some of the work going on, behind the scenes mostly, to try to make life in an agency a little better.

When I took over from Cathy as Chairman, having spent 5 years as the East Midland delegate, I thought I had a good understanding of what being Chairman would involve. After all, I spent 2019 working very closely with Cathy and shadowing many of her meetings. It was always going to be a very time-consuming job and one you had to give your heart and soul to. What was clear at the end of 2019 was that the workload expected of the ALG group was already testing capacity and beginning to encroach of the agency lives of some of the delegates. It is a fact of life that with in a group of volunteers some are more able and willing to do more than others. So, those that could and that would, did more, and in my view often did too much. It became very clear that the workload needed to reduce or the ALG needed to get bigger! Group discussions had already started to start to think about how the ALG structure could change to accommodate the increasing number of requests being received from NFU Mutual to help. Then COVID-19 struck, and the plans were "back burnered".



Life has calmed a little since the Spring and we have had time to progress the re-structuring conversations. My Office Holder colleagues and I, together with Agency Department are at the early stages of draughting a new terms and reference for the ALG, which will include formal details of the group structure, the creation of new roles including making the role of a regional deputy delegate more formal. Some of the changes this will bring have been pre-empted and work has already started. The number of subgroups has dramatically increased and the work required increased too. Subgroup leaders are being appointed within the ALG to help channel some of the communication and streamline some the work. The leaders will act as primary contacts for NFU Mutual and may become directly accessible to the wider network once established. For more details of the subgroups and leaders please visit the new NAGS website.

The other significant change this year has been the creation of a dedicated ALG SharePoint site. John Bloomer kindly built the site for us and it is where all the questions and issues raised by you are logged, resolved (or not) and then closed. The ALG now has a single record of all matters discussed, who they referred to, what was agreed etc. It is split between COVID-19 related issues and BAU issues.

Updates from some of the more important groups.....

CRM Subgroup Leader – John Bloomer, Senior Agent from Marlow

From the CRM perspective we had been working with the programme with a view to ensuring that Agents' needs, and user efficiency, were at the forefront of the planning, design, and delivery of everything CRM. What have we achieved? Not as much as any of us would have hoped! Why? Because our involvement up to now has been somewhat constrained by being mainly post design. We have not been given the chance to comment on what we need and then review and comment on functionality or been involved in the actual design workshops, where the actual end product needs are thrashed out between the various teams involved before it is rolled out to agencies. There is a concern that this level of involvement could impact our self-employed status. This means that the changes we look for are normally added to the backlog of change requests to be delivered in future, after roll out, rather than getting to be embedded in the core of the product being built and delivered now.

We did however have some wins. For example, we managed to influence the training that sits behind the roll outs. Ensuring in the main that there was not an enforced/mandatory training for each roll out, as we know that many users are already very capable with the system. We feel that the non-mandatory approach used for most roll outs, with video and e-learning, taken by those who need it when they need it, is much more practical and ensures that time is not wasted unnecessarily. We also had some wins in pushing back against certain design and process elements, including potential double keying scenarios, that we knew would have been extremely inefficient. Several our requested changes during the design feedback sessions have also been accepted for development, once the programme transitions to IT in the new year.

Overall, with the exception of Complaints, which had a few hidden surprises, we felt that we were largely aware of and, although not completely in agreement with all of the functionality, happy that we being at least getting our small wins, and receiving a more useable and beneficial product as a result.



I know from our own agency's perspective that, without the current CRM functionality, we would have struggled massively to suddenly shift to the work from home model enforced upon us all this year. Instead, despite COVID-19, we are looking back on a year of positive growth, where we supported our customers far better than most of our local competitors, beat our new business targets, and largely managed to work in a way that I personally thought would never be possible without having everyone together in the office every day. I honestly don't think we could have managed that without having a central system for tracking both sales and customer service requests where staff could share and collaborate.

No doubt what is good for us is good for the Mutual overall and moving forwards, our main goal is to build a strong, influential relationship with the newly set up "Group CRM" office, headed up by Nick Pierson, in order to:

- A. Keep a focus on delivering the true "single customer view", that is possible but just not quite there yet, as we know that this would ultimately be very beneficial.
- B. Solve several key issues that exist in the current system including data duplication and missing options for properly tracking FS and NIS pipelines.
- C. Try to ensure that we end up with a fully functional and more efficient system and that we are involved in design stage of any items yet to be delivered (CARs, integration to Bridge) with the aim of getting the roll out right first time.
- D. To keep pushing for the great functionality that is currently turned off to be switched on, so that those of us who wish to can fully benefit from the advanced functionality that Microsoft builds to drive productivity. These include Sales AI for in-call cross sell suggestions, marketing automation, phone, social media, and email integration and many more.

We have a good relationship with Nick Pierson, and he comes across as very passionate about wanting to finish building something that benefits us all. So I am hopeful that in the end we will get the system to where it needs to be to be a real game changer for us all. We will certainly keep working hard towards that goal!

T & C (& Vulnerable Customers) Subgroup Leader – Kate Sowden, Senior Agent from Durham

Vulnerable Customers (VCs) – Richard Turner and I have been sitting on the Vulnerable Customers group with the NFUM lead Andrew Lear, Richard Savage & Ben Mattless. This group was formed following an ALG meeting earlier in the year where Nick Turner raised the levels of VCs recorded in the agency network when compared to the rest of the market.

The group currently meets every three weeks to keep this project as fresh as possible. There have been some good new resources developed, such as the improved vulnerable customer page on Mutualnet with links to third party organisations, support documentation and training guides to help staff. A mailing to all customers to report vulnerabilities is being considered. System glitches have been identified where business client customer care flags are not being pulled through on IFACES reports or even being picked up by the CRM. The suggested workaround is not acceptable, and we are pushing back hard. Work continues.



Training on VCs has been part of the focus and the current iAchieve training is incredibly dry. We are looking in to getting the up to date VCs training as a video. Richard Turner may take the starring role to try and bring what we do with VCs alive to the staff and Agents.

T & C - This group had been dormant for some time and has been brought back to life to help with the re-pre-release (it nearly got to us!) of the new Insights program being rolled out in March. The group is made up of 4 agents, two agency staff members and various project members from NFUM. The Insights system is looking very positive and will hopefully give us a better training record system than Trace. There are certainly a few issues with the system though. Having previously been told that email alerts as reminders when tasks are due were not available, it transpires that they are, but NFUM had opted not to enable this function. We have pushed back incredibly hard on this point and emails alerts are now being reviewed.

With the new system there will also be a change to the developing for success conversations with our staff. This will move to a training needs analysis form and the details will be recorded in Insights. They are planning for this to change in March also. The aim with this is to see from a licencing perspective where your staff member is and where they are aiming to go. We have asked for it to be slightly broader than this as current DFS conversations are not limited to NFUM training only.

User acceptance testing and Trace clear up will be trialled and carried out by the group in the very near future to see if there are any gremlins that need sorting.

The T & C list will not end with Insights! Whilst this is topic of the day the T & C improvement list is almost endless, so no doubt the group will be kept very busy in the coming months.

Bridge Focus Group (BFG) Subgroup Joint Leaders

Jo Oliver Senior Agent from Preston & Gemma Heal Senior Agent from Wells

This will be the largest Subgroup, longest running and possibly the most important. It will be time consuming to be involved in, complex and multi layered. Several ALG members will belong, along with Agents and Agents staff from the network potentially. NFU Mutual previously employed to help deliver Claims Ascent are working with the BFG to help emulate some of the lessons learn with the claims system delivery. Whilst work on Bridge started a couple of years ago it was largely behind the scenes. The first meeting with the ALG Subgroup has taken place, so the real work starts now.

Agents Farming Group (AFG) Subgroup Leader – Hugh Davies Senior Agent from Builth Wells

It would remiss not to include a few comments about this group, that seems to have been running for ever. It is here where all matters relating to farm insurance are debated, challenged, and improved where possible. Subjects dominating conversations this year have included AV rates, shoot trailers, Vulcan Inspection Services, liability indemnity limits, ride-on lawn mowers, LGV rates, young drivers, local farm assessors, Smallholder, Renewables and I could fill a page if I kept going. The wins achieved by this group are too many to mention. Whilst the CRM as a subject is almost notorious now and Bridge is possibly going to dominate all our lives over the next few years, the AFG push on in the background dealing with the day



to day issues around farm insurance. The work they do is vital for all of our businesses, and I would like to thank Hugh Davies, Dave Blackwell and our other colleagues for their efforts.

And to finish.....

I hope the above have given you a flavour of what the ALG has been doing and what it will be doing over the coming months and years. The ALG's reputation in NFUM has never been higher. We have never received as many requests for help from across the NFU Mutual Group. Communication channels have been developed outside or the norm and directly with Customer Service, Sales, Market and NIS at the highest levels. Tom Shepherd and I were invited to the Ice Survey Stakeholder meeting to witness the deliver of the Ice Survey results to the various divisions, which, in itself, is a sign of intent by NFUM to engage with us more.

Request for help.....The ALG needs you! We need you to volunteer at your regional NAGS AGMs to become deputy delegates or delegates. The work is time consuming. It is often frustrating but ultimately is extremely rewarding. If you are interested and you can and are willing to express your opinions, for the greater good of the wider network, in a polite, professional and respectful manner, you are the person for the job. Give you local ALG delegate a ring and do it now, please.

It only remains for me to wish you hall health and happiness for the festive season ahead and the new year to come.

Kindest regards

Nick

Nicholas Pope
Chairman, NAGS ALG

