October 22-25, 2026 I Sheraton Boston Hotel

MAIA'S BIG EVENT 2026

Conference & Trade Show

Celebrating Independence!

10/24/2026
2:30 pm - 3:30 pm

The Customer Has A Need To Know

The customer has a need to know

Marshall Katz

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Keep for the future

- Follow up
- Questions
- Jokes☺

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Did you ever get one of those calls where they want

a doctoral thesis answer, and

- They're not going to want to hear it all
- They'll forget most of what you say and
- Then blame you when things go wrong

Create white papers

Why create white papers?

- To inform customers of need-to-know stuff
- To make it easy for communication
- To make it consistent along agency platforms
- It's in writing if needed later



Things get lost in conversation because our brains process, prioritize, and retrieve information imperfectly. Key reasons include **cognitive overload** (where working memory gets full), **distractions** (internal wandering or external noises), **emotional triggers** that shift focus to feelings rather than facts, and **mismatched assumptions** about what the other person already knows. [1, 2, 3, 4] Dr Tracy Marks YouTube



When can my 16 year bring friends in the car with him?



Do I have to list my live-in friend on my auto policy because my friend's agent states I do not have to?



I had my roof damaged by the storm. What do I do.



The insurance company is telling me they are only paying for ACV on my burnt down home.



The Procrastinator Flood Loss

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Newly Acquired Vehicles MAP

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The Rental Car



Accessory Dwelling Unit

Accessory Dwelling Units Officially Allowed Statewide
Executive Office of Housing and Livable Communities Issues Final Regulations to Help Cities and Towns Update Local Regulations
For immediate release: 2/03/2025
Executive Office of Housing and Livable Communities

Electric Bicycles



TNC-Dropped at wrong address across the street and broke ankle in pothole



Custom Equipment



Electronic Equipment



Vehicle Sharing

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Vrbo, Zumper, Airbnb, etc.

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In woodworking we use jigs to

- Make things consistent and
- Easily repeatable

In insurance we white papers to

- Make things consistent and
- Easily repeatable and
- Have in writing should we need to



comments
Questions
Suggestions

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Last one.



Have a fun rest of your day and thanks for your attendance and participation☺