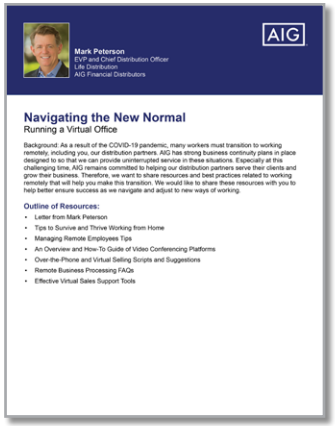
Navigating the New Normal

Running a Virtual Office



Mark Peterson
EVP and Chief Distribution Officer
Life Distribution
AIG Financial Distributors

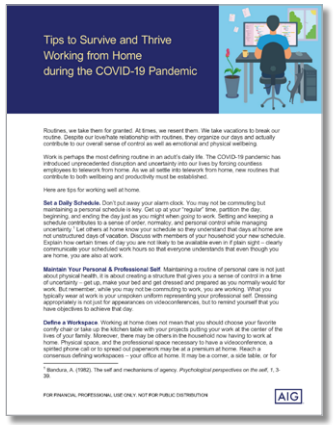
Navigating the New Normal
Running a Virtual Office

Background: As a result of the COVID-19 pandemic, many workers must transition to working remotely, including you, our distribution partners. AIG has strong business continuity plans in place designed to so that we can provide uninterrupted service in these situations. Especially at this challenging time, AIG remains committed to helping our distribution partners serve their clients and grow their business. Therefore, we want to share resources and best practices related to working remotely that will help you make this transition. We would like to share these resources with you to help better ensure success as we navigate and adjust to new ways of working.

Outline of Resources:

- Letter from Mark Peterson
- Tips to Survive and Thrive Working from Home
- Managing Remote Employees Tips
- An Overview and How-To Guide of Video Conferencing Platforms
- Over-the-Phone and Virtual Selling Scripts and Suggestions
- Remote Business Processing FAQs
- Effective Virtual Sales Support Tools

[Letter from Mark Peterson]



Tips to Survive and Thrive Working from Home during the COVID-19 Pandemic

Routines, we take them for granted. At times, we resent them. We take vacations to break our routine. Despite our love/hate relationship with routines, they organize our days and actually contribute to our overall sense of control as well as emotional and physical wellbeing.

Work is perhaps the most defining routine in an adult's daily life. The COVID-19 pandemic has introduced unprecedented disruption and uncertainty into our lives by forcing countless employees to telework from home. As we all settle into telework from home, new routines that contribute to both wellbeing and productivity must be established.

Here are tips for working well at home.

Set a Daily Schedule. Don't put away your alarm clock. You may not be commuting but maintaining a personal schedule is key. Get up at your "regular" time, partition the day: beginning, and ending the day just as you might when going to work. Setting and keeping a schedule contributes to a sense of order, normalcy, and personal control while managing uncertainty.[1] Let others at home know your schedule so they understand that days at home are not unstructured days of vacation. Discuss with members of your household your new schedule. Explain how certain times of day you are not likely to be available even in if plain sight – clearly communicate your scheduled work hours so that everyone understands that even though you are home, you are also at work.

Maintain Your Personal & Professional Self. Maintaining a routine of personal care is not just about physical health, it is about creating a structure that gives you a sense of control in a time of uncertainty – get up, make your bed and get dressed and prepared as you normally would for work. But remember, while you may not be commuting to work, you are working. What you typically wear at work is your unspoken uniform representing your professional self. Dressing appropriately is not just for appearances on videoconferences, but to remind yourself that you have objectives to achieve that day.

Define a Workspace. Working at home does not mean that you should choose your favorite comfy chair or take up the kitchen table with your projects putting your work at the center of the lives of your family. Moreover, there may be others in the household now having to work at home. Physical space, and the professional space necessary to have a videoconference, a spirited phone call or to spread out paperwork may be at a premium at home. Reach a consensus defining workspaces – your office at home. It may be a corner, a side table, or for

[1] Bandura, A. (1982). The self and mechanisms of agency. *Psychological perspectives on the self*, 1, 3-39.

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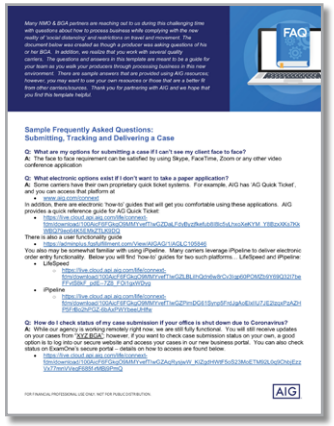
[Tips to Survive and Thrive Working from Home]



FAQ

Many NMO & BGA partners are reaching out to us during this challenging time with questions about how to process business while complying with the new reality of 'social distancing' and restrictions on travel and movement. The document below was created as though a producer was asking questions of his or her BGA. In addition, we realize that you work with several quality carriers. The questions and answers in this template are meant to be a guide for your team as you walk your producers through processing business in this new environment. There are sample answers that are provided using AIG resources; however, you may want to use your own resources or those that are a better fit than other carriers/sources. Thank you for partnering with AIG and we hope that you find this template helpful.

Sample Frequently Asked Questions:
Submitting, Tracking and Delivering a Case

Q: What are my options for submitting a case if I can't see my client face to face?
A: The face to face requirement can be satisfied by using Skype, FaceTime, Zoom or any other video conference application

Q: What electronic options exist if I don't want to take a paper application?
A: Some carriers have their own proprietary quick ticket systems. For example, AIG has 'AG Quick Ticket', and you can access that platform at

- www.aig.com/connect

In addition, there are electronic 'how-to' guides that will get you comfortable using these applications. AIG provides a quick reference guide for AG Quick Ticket:

- https://live.cloud.ap.aig.com/file/connect-fdmx/download/100AAxF6FGNqO8MMYveFTwGZDqLF0yBycjRwfu8dB8cfqLhxoXeKYM_Y8BzxX9cs7PXnWB27dwdMA5EMxZ8JK0ZQ

There is also a user functionality guide

- https://admpro.bafulfillment.com/View/AGAG13/GLC100646

You also may be somewhat familiar with using iPipeline. Many carriers leverage iPipeline to deliver electronic order entry functionality. Below you will find 'how-to' guides for two such platforms… LifeSpeed and iPipeline:

- LifeSpeed
  - https://live.cloud.ap.aig.com/file/connect-fdmx/download/100AAxF6FGNqO8MMYveFTwGZLBLlihQdmbvBrOc3tqpKKPO96Ds9YI9GI3J7bwFFxBBvF_pdE-7ZB_FSX1qnW0xg
- iPipeline
  - https://live.cloud.ap.aig.com/file/connect-fdmx/download/100AAxF6FGNqO8MMYveFTwGZPmDG61SvnpSFnLlqAxEEeIU7JE2ipzPaAZHPSF4bu2bFCZ1dbAxN7XYSeeLAdfw

Q: How do I check status of my case submission if your office is shut down due to Coronavirus?
A: While our agency is working remotely right now, we are still fully functional. You will still receive updates on your cases from 'XYZ BGA', however, if you want to check case submission status on your own, a good option is to log into our secure website and access your cases in our new business portal. You can also check status on ExamOne's secure portal – details on how to access are found below.

- https://live.cloud.ap.aig.com/file/connect-fdmx/download/100AAxF6FGNqO8MMYveFTwGZAxRyisavW_K0ZqHhWFfc5ij23MoETM5QLOqdCHqEzzVx77ienVHxqF5B5f-dVBbPHcQ

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[Remote Business Processing FAQs]

Managing Remote Employees

March 19, 2020

[Managing Remote Employees Tips]

Video Conferencing Technology Overview

March 2020

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[Overview and How-To-Guide of Video Conferencing Platforms]

Finding Success with Online and Over-the-Phone Selling

March 18, 2020

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[Over-the-Phone and Virtual Selling Scripts and Suggestions]

Effective Virtual Sales Support Tools

March 2020

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[Effective Virtual Sales Support Tools]

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