

InSITE



SUMMER NEWSLETTER



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PRESIDENT'S MESSAGE

Annual Conference Update

Larry Nicholson, MBA, MS-RMI
SITE President

Dear SITE members, guests and friends,

It is with the deepest regret I announce SITE's decision to cancel our upcoming 2020 annual conference. As you can imagine, as SITE President, I looked forward to experiencing this event with you in New Orleans. Given the changing circumstances, high health risks, and travel restrictions, I am confident your SITE board members and staff have made a proper and responsible decision.

Earlier this year, we released the Presidential Spring 2020 message, framed by the theme of the 2020 conference – "Learn and Lead in the Big Easy." A couple of months later, the entire world – populations living on six continents – are engaged with the global pandemic caused by COVID-19. We at SITE, like many other organizations, are following the guidelines implemented by our state and local officials. Our thoughts and hearts are with those who are impacted by these events and their families.

To all of our attendees, Train the Trainer participants, exhibitors and sponsors who were planning to attend, we apologize for the inconvenience this cancellation has caused. SITE has been working diligently to process refunds for registrants, exhibitors and sponsors. As of publication date – all fees have been refunded.

The JW Marriott New Orleans has cancelled all reservations made under SITE's room reservation block. A cancellation notice was sent to the email address used when making the reservation. In the event you did not receive a cancellation notice, or you made your hotel reservations outside the SITE reservation block, you are encouraged to contact JW Marriott New Orleans directly at (504) 525-6500.

SITE is working hard to provide more virtual opportunities to stay connected with you! I had the pleasure to be interviewed recently by Patrick Wraight and with Past President, Sandra Colley on SITE's Podcast. We kicked-off the Podcast by sharing available opportunities to connect with members, learning trends, technology, and professional development. Please stay connected and look for available opportunities to join virtual roundtables, webinars, podcasts and virtual Key-Speakers.

SITE is a member-run, not-for-profit organization that exists to serve its members, so I cannot thank you enough for the contributions and valued expertise you have shared with SITE. Should you have any questions, please do not hesitate to contact the SITE Office at (850) 205-5635 or office@insurancetrainers.org.

Sincerely,

A handwritten signature in cursive script that reads "Larry Nicholson".

Larry Nicholson, MBA, MS-RMI
SITE President

SITE News

Welcome New Members!

We would like to welcome the following new members to SITE!

America's Professor

Neil Morton

Baxter Restoration

Adam Clancy

First National Insurance Agency, LLC

Leslie Humes

Independent Insurance Agents & Brokers

Deborah Pickford

PayneWest Insurance

Lois Lee

Samantha Venable Harjo

Premier Group Insurance

Cassandra Hayne

Property & Liability Resource Bureau

Tondra Lee

UL, LLC

Neil Lakomiak

West Bend Mutual Insurance Company

Kristin Bunkelmann

SITE Congratulates New ITP Designees

The following individual(s) have recently received the Insurance Training Professional (ITP) Designation:

- **Catherine Hall, AINS, AIS, ACS, SM, ITP** - Federated Mutual Insurance Co - March 2020
- **Jennifer Jensen, ITP** - Delta Defense LLC - March 2020

For a full list of our ITP's - please [click here](#).

The Insurance Training Professional (ITP) designation was created with member input and recognizes individual excellence and professionalism in training and education in the insurance industry. The designation requires both training/education and insurance experience/knowledge. It is a balanced blend of insurance, training, education, and years of industry experience. **Over 127 individuals have earned their ITP designation to date.**



Interested in what it takes to receive this title? [Page 13](#) of this newsletter has additional details about qualifications and how to apply.

SITE News Cont.

SITE Members Invited to Join ATD Virtual Conference: Building Capabilities & Connection

We believe that the role of workplace trainers and educators has never been more important. You will be the ones who help organizations upskill and reskill to emerge stronger on the other side of the world-wide pandemic and recession.

So, even though we had to cancel the 2020 SITE Annual Conference, we're pleased to announce a special opportunity for SITE members to attend the upcoming [ATD Virtual Conference: Building Capabilities & Connection](#). From now through June 1, SITE members can apply the code "FriendsofATD" for \$25 off registration.

ATD is the world's largest membership organization serving training and talent development professionals. This conference will feature 100+ hours of content focused on your professional development needs. We hope you'll make your professional development a priority and strongly encourage you to attend [ATD Virtual Conference: Building Capabilities & Connection](#).





ABI POTTER CLOUGH, MBA, CPCU

AbiLeads

CEO

Managing Social Media: Design Through Chaos

During these interesting and unprecedented times, we all have opportunities to do things differently. Quarantine and stay at home orders may limit us but they also challenge us to try new ways of doing and being. The same can be true for your social media management. This is a great time to try new tools and ideas to manage your social media by design.

Designing through the chaos, pandemic-induced or otherwise, can bring you peace and make the most of the new normal by highlighting opportunities to use your social media to enhance your personal brand. Design by definition means a “[plan or drawing produced to show the look and function before it is made.](#)” By designing your social media, you are planning what content you will produce and how you will engage with your followers. This allows you to thoughtfully think about what and when to post to reach your target audience. Planning in advance lets you be clear about next steps and prioritize content, as well as decrease stress. This is helpful through crises and normal times alike.

Try Design Thinking

If you have already designed and established your personal brand, that will help guide you through designing your social media in a chaotic situation. Your brand tells you what you stand for, who you are, and you can start there to cultivate a plan.

We can borrow from Design Thinking to conceptualize how to manage your social media. Think of the [5 phases of Design Thinking](#) as:

1. Empathize with your users
2. Define users' problems and needs
3. Ideate by creating ideas and challenging assumptions
4. Prototype through designing solutions
5. Test your solutions through your posts and trial and error

These five phases do not need to be completed in any certain order and can be repeated as necessary. You can go back to defining needs and problems while forming solutions, for example. The framework helps to organize your thoughts around your design, while also moving forward options to test and iterate. Borrow also from lean thinking and fail fast – try an idea and if you find you do not get the engagement you expect, move on, and try something else. Having a design planned out for your posts allows you to iterate and edit if needed when you learn from failing.

5 Design Ideas

- Stay **visible** – there could be a tendency to hide away in fear of saying the wrong thing during chaotic times, but people look to their favorite brands for stability and if you have been providing content pre-COVID-19, continue during and after. Content can change, but your consistency does not need to!

Relying on your routine and normal social media posting structure can also give you some much-needed normalcy through chaos.

- Use your existing platform to provide **information** – are there crisis-related tips, resources, or information you want to share? Your existing social media platform is perfect – schedule your posts using a calendar system to easily distribute resources.
- Show **empathy** – publish posts and information that shows you care. People need reassurance during chaos, and everyone likes to feel understood and heard. This is likely easy to reflect in your posts as you probably are also hoping for the same from brands you follow. Remind your followers to stay safe, focus on the health and well-being of others, and communicate that your people (employees, customers, volunteers) are your number one priority.
- Stay **positive** – there is plenty of overwhelming media available right now. Try sharing positive messages and stories with uplifting outcomes.
- **Engage** with people – plan out ways to engage – reader polls, questions, contests, discussions, AMAs, could all be interesting ways to interact.

Helpful tools

There are plenty of apps and tools available to help you plan your social media. You can find help with calendars, overall planning guides, metrics, and photo editing. There are AI-based apps available, some which search online for mentions of your brand, compliments or complaints; others that search for relevant content to repost for you. Some apps can interact with your followers. All are designed to save you time or effort. I like to start with a free trial or the free version of the app to see how it works for me, especially knowing there are hundreds of competitors. Starting slowly makes sense, perhaps with an app to schedule your posts among all your social media channels. This increases engagement across platforms and saves you time.

Resources

This is a [guide](#) you can download and use to frame your thoughts and begin to schedule your social media posts. If you would like additional information or help with your social media plan, contact Abi or go to www.abileads.com. You can also schedule an interactive webinar with Abi for your group on social media management, personal branding, or many other topics.

Abi Potter Clough, MBA, CPCU, is a keynote speaker, author, and business consultant focused on leadership, personal branding, insurtech, and risk management. She has over 15 years of experience at a Fortune 500 company with operational leadership, lean management consulting, and digital communications insurtech expertise. She chairs the International Insurance Interest Group of the CPCU Society and devotes time to many international risk management projects. Abi is CEO of AbiLeads. For more information and to book Abi, go to www.AbiLeads.com or email at Abi1Leads@gmail.com.



AMY WANINGER, CPCU, CIDM,
AIM

Lead At Any Level

Founder & CEO

Why Create a Learning Culture?

Peter Drucker famously said, "[Culture eats strategy for breakfast.](#)" In other words, your strategy will go nowhere if your culture doesn't support it.

I would take this a step further and say, "Culture IS strategy." Any goal that you intend to reach will fail, unless your culture is aligned to that goal.

The Insurance Industry as an Example

If you work in the insurance industry, the purpose of your work is to keep a promise. Whether you work for a carrier, agency, brokerage or service provider, you play a part in fulfilling a past promise made to a policyholder.

Because of this, everything we do has to be aligned to long-term customer service. The best way to support our customers is to stay on top of, or even predict, what they need. We must then continually learn how we can better meet those needs.

Ultimately, insurance does two things:

1. It makes all economic investment possible, and
2. It helps people on their worst day.

If we are to maintain our promises in the future, we need to stay out in front of what's coming. A learning culture can help us do that.

According to the [Association for Talent Development](#), top performing organizations are five times more likely to have learning cultures, compared to lower performing organizations. It's not hard to imagine that these companies are high performing *because* of their learning cultures.

The High Cost of Low Engagement

Across all industries, Gallup (["State of the American Workplace," 2017](#)) estimates that 34 percent of annual salaries lost to disengagement. When employees are disengaged, they are not as productive and not innovative. If employees don't feel safe, they can't contribute to their fullest.

Let's think about what this could mean for a single Fortune 500 company. Consider, for example, a company that has 30,000 employees with an average salary of \$56,000. This company spends \$1.7 billion in annual salary, exclusive of benefits such as health insurance and 401(k) match. This fictitious company stands to lose \$570 million each year due to disengagement!

That's the impact on just one company. Now think about how much this costs the industry as a whole. The cost goes beyond lost dollars. It also includes the loss of any innovation could have happened with one-third of our staff. Think of the products and services that aren't being created or implemented, or the number of [customers](#) who aren't being served.

Such a loss is a tragedy for the industry, our economy, and the clients we serve.

Learning Cultures Build Engagement

Providing ongoing learning challenges is essential to employee engagement. Younger professionals, in fact, are [motivated as much by learning opportunities](#) as by other benefits.

Based purely on engagement savings, companies can see a tremendous return on a relatively low investment. When you further contemplate the "time value of potential" for these employees, the dividends are immense.

Learning Cultures Represent a Long-term Investment in Talent

It's no secret that industry leaders are worried about a talent crisis, or talent cliff. Roughly half of our knowledge workers are [on the verge of retirement](#). When they go, they will take institutional knowledge with them. The insurance industry is not alone in this. Other industries face similar challenges.

Folks coming in early- or mid-career have much to learn about the industry. To make matters worse, there are [fewer newcomers](#). It's easy to see the knowledge gap that looms.

Furthermore, if we are to retain new employees, we need to make sure we're actively engaging them. How better to engage than in a learning environment where professionals can [build skills, knowledge, and confidence in their roles](#)?

Improved Customer Service

Finally, customer service improves significantly in a learning organization.

[Bersin & Associates](#) reports that companies with learning cultures are 34 percent better able to respond to customer needs and 58 percent more likely to meet future demand. The combination of these, remember, is the very promise of insurance: to be there for our customers when they need us most, at some undetermined point in the future.

What's more, Bersin tells us these companies are 46 percent more likely to be first to market and 17 percent more likely to be a market share leader.

Creating a learning culture, then is critical to the top line, the bottom line, long-term growth, and customer satisfaction and retention.

Why would we **not** to create a learning culture?

Amy C. Waninger is advancing diversity and inclusive leadership throughout the insurance ecosystem and beyond. She is the author of multiple books including [Network Beyond Bias: Making Diversity a Competitive Advantage for Your Career](#). Amy earned her CPCU designation in 2016. She also holds the AIDA, AIT, AIM, AIC, and AINS designations from The Institutes, as well as the Certified Insurance Data Manager designation from IDMA. Amy is a Professional Member of National Speakers Association and a Prosci Certified Change Practitioner. Her other credentials include two degrees from Indiana University and a World's Best Mom coffee mug.

Learn more about Amy and her programs at www.LeadAtAnyLevel.com.



HEATHER BLEVINS, CPCU, AIC,
AINS, AIS, SCLA

State Farm Insurance

Change Management Analyst

What Have You Done with the Time You Have?

“I wish it need not have happened in my time,” said Frodo. “So do I,” said Gandalf, “and so do all who live to see such times. But that is not for them to decide. All we have to decide is what to do with the time that is given us.”- J.R.R. Tolkien

Time seems almost completely irrelevant recently, and there are many days when I am not sure what day of the week it is. Even when it’s Monday or Friday, I get tripped up as to what day it is. Most of us feel like we are living a pseudo- Groundhog Day like existence with waking up to exactly the same thing, every single day. Bill Murray’s 1993 classic film seems to have been brought to life in 2020. Phil Connors said “What if there was no tomorrow? There wasn’t one today,” and we all collectively sigh and nod in agreement.

The time we are living in right now is unprecedented, and is impacting all of our lives in very unique ways. We are not all in the same boat, nor are we all experiencing this massive change to our existence in the same way. Some of you are continuing to go to an office every day. Some of you have completely transitioned your life to working from your household. Some of you are now teaching and training others virtually and are missing the “connection” of being in person with people, but figuring out creative ways to engage your learners and peers. Some of you are balancing that working from home arrangement with homeschooling children full time as well. Some of you may have been living with the reality of this terrible pandemic striking your family members, or even you. Some of you may have been impacted in the loss of a job, or helping family members who have been furloughed or laid off during this time. Some of you are working more hours than you ever were before. Wherever you are, whatever you have been doing over the last several months, just know your SITE family is thinking about you, and want to be a resource to you during what feels like such a chaotic time in all of our lives.

One thing I have noticed in my life during the quarantine is it seems time has become something of a weird construct. There are still 24 hours in each day, I know that logically, but there is just this strange ebb and flow of time which feels odd. Some days I have used my time well, and felt as if I had made some major accomplishments. Some days, well, they’ve just felt awfully wasted. But even in those “wasted” moments of time where maybe I was watching too much streaming television, I believe important things were happening for, at least for my mental health. We all have been forced into a massively stressful situation with our own curveballs and nuances based on our life circumstances, and are all managing our walk through this time, in our own ways. But something I realized just this week is the very best thing about our time, is that we can choose at any moment to do something wonderfully productive with it. And when we make that choice, just watch what we can do!

The COVID-19 pandemic touches every part of our lives - our health, our work, our immediate and extended families, our daily lives from grocery shopping to school activities to getting a haircut. And that is why now more than ever it's important to focus on self-care and maintaining a healthy lifestyle, and bringing out the best

in a difficult situation. And that requires a mindset shift, intentional actions, and asking yourself some serious questions. What are we to do with the time we have?

Now, more than ever, is a great time to re-focus your efforts on something that interests and inspires you. Maybe check out some new networking opportunities! Have you updated or looked at your LinkedIn profile recently? Have you thought about dusting off your resume? In light of all of the challenges going on within all of our worlds, it's just a good idea to keep those things up to date, and maintain your connections. And if you are currently looking for work due to the pandemic, just know that you have many connections with the SITE organization. Reaching out during this time to those connections could be a step towards your next exciting role.

One thing is for certain, ZOOM has become such an awesome platform during this time for so many people to stay connected with each other, and it's an amazing training platform as well with exciting new ways to engage learners. SITE has been offering some Virtual Roundtable ZOOM calls on a regular basis which have been insightful and fun. If you haven't taken advantage of the opportunity to jump into one of those calls, do it now! Maybe now is the time you want to put together a really cool webinar, and showcase all of those skills you have developed through your experiences, and the virtual roundtables can help you with ideas on how to do that.

Now is also a great time to figure out new and different ways you can give back to your community. Charitable organizations need our help now more than ever. It really has been incredible to see the generosity of humanity at work during this time. One quick Google search will give you literally thousands of ideas on how to give back. And bonus points, giving back to our communities reminds us that despite how dark these times feel, there is still a lot of good in this world!

Now is also a fantastic opportunity to work on yourself. My company launched the Degreed® learning platform within our organization during the pandemic as a resource to explore new skill sets and work on personal and professional development. I have challenged myself to spend 2 hours per week on exploring self-development topics on this site, and am working to make that a regular habit. Another suggestion I heard from a co-worker was to spend some time dusting off your development plan. I built an incredibly robust development plan at the beginning of this year, and realized I had not looked at it once during my shelter-in-place time because I had spent so much time focusing on responding to the crisis within my work. Taking the time to slow down, and re-evaluate my development plan and be intentional about exploring opportunities for development during this time has been a great stress reliever for me! It has also helped me to re-focus my goals considering the changes in my work arrangements and life, which I know everyone is experiencing.

Suffice to say, Gandalf has it right. We have a choice in what we do with the time we have. And while our "adventures" may not take us far from the Shire like they did little Frodo for the time being, we can certainly choose adventures which will increase our knowledge, and give us the opportunity to share and connect with others. All we have to do is decide what we are going to do with the time we have.

Heather Blevins began her career in insurance with State Farm in 2004. She currently works as an Organizational Change Analyst. The thing that gets her excited about her work is she gets to be an integral part of something much greater than herself. Training and teaching others about the world of insurance sets her soul on fire! Heather serves as the Vice-President of Marketing for SITE. On a personal note, she enjoys writing, college football and traveling the world.

Upcoming Webinars & Events

As a benefit to our members, we provide free monthly webinars to keep you up to date on training and education trends. Visit our [webinar page](#) for upcoming registration information.

May 28th at 1:00 p.m. EST

"Thriving in Quarantines"

Presented by: Sandra Colley, SITE Past President

[Click here to register!](#)

Archived Webinars

Did you miss that webinar 3 months ago that everyone at the watercooler was talking about? Perhaps you attended one a while back but wanted a refresher or the notes that went along with the presentation?

Your SITE membership includes access to our archived webinars only available by login! Search through several years of videos by logging in to our Members Only portion of the website to start watching.

Not sure how to login? Click on the grey Member Login box on the top right hand of the www.insurancetrainers.org website and fill in your credentials. If you don't remember them, you can select Retrieve Username or Reset Password for instant access.

Use the drop down selections now available to you (shown below) for entry to this member only benefit.



Podcasts

SITE is proud to announce the availability of our podcast series available on SoundCloud, iTunes and through our website for free with your membership. Access our episodes by logging in and selecting the **Podcast** tab under the [Education & Events](#) bar.

Upcoming Webinars & Events Cont.

Interactive Virtual Roundtables

Based on feedback from members on a desire to continue to connect and learn more about virtual communication options SITE created the Interactive Virtual Roundtable series. Two sessions were offered in April to learn more about how to use Zoom and discuss the new adjustments many of us are going through currently.

Due to the success of these offerings additional sessions were added to the calendar. Topic areas were developed and the ability to dive deeper via break out groups has been added to maximize your time and experience within our 30-minute calls.

We look forward to “seeing” you at these upcoming events and know your participation will yield great take-aways!

Access links are available [HERE](#).

Join us via Zoom for our upcoming series:

May 29th @ 2pm EST
**“Helping Presenters
Go Virtual”**

How to Create Breakout
Rooms and Engaging
Icebreakers

June 12th @ 2pm EST
“Authoring Tools”

*Interactive
Virtual
Roundtable*



"Invest in yourself and get connected with a mentor who can help you set goals and define where you want to go.

It gets a lot easier when you have a path to follow!!"

Andrew Poso
Claims Learning & Development Manager
CSE Insurance Group

2019 SITE Mentorship Program Participant





What is the Insurance Training Professional designation?

The Society of Insurance Trainers and Educators created the Insurance Training Professional (ITP) designation to recognize individual excellence and professionalism. It is a balanced blend of insurance, training, education, and years of industry experience.

What do I need to qualify?



Membership in SITE



Insurance Industry Knowledge Requirement (Select One)

- Copy of insurance designation(s)
- College transcripts showing 20 hours in insurance or financial services courses OR degree(s) in Insurance
- Resume verifying 10 years' insurance experience



Training/Education Knowledge (Select One)

- Completed the SITE Train the Trainer program or pre-approved program (listed online)
- Earned 20 or more semester hours or completed an accredited degree in education-based courses



Professional Training/Education Experience

Course outline that you or your team has designed or delivered that includes:

- Learning objectives
- Training techniques/methodologies utilized
- Copy of an evaluation tool which assesses the training and/or instructor



Length of Time as a Training/Education Professional

- Demonstrate five years' experience as a training/education professional.

ITP checklist and application available at:
www.insurancetrainers.org/itp-designation

Questions? Contact us at office@insurancetrainers.org

Board of Directors 2019 - 2020



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Immediate Past President

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VP Annual Conference

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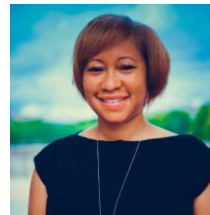
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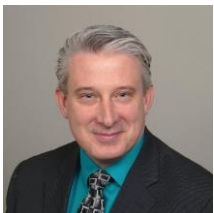
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