InSITE

SITE®
SOCIETY OF INSURANCE TRAINERS & EDUCATORS

WINTER NEWSLETTER

Inside this issue of InSITE

Registration Now Available!

PRESIDENT'S MESSAGE

Your Input Steers Our Ship

Larry Nicholson, SITE President

Dear SITE members, guests and friends,

As we enter Winter and finish up the year of 2019, I would like to share with you some positive progress that SITE has made since our previous quarterly update and share some key takeaways from our October in-person board meeting in Colorado Springs. However, before I go any further I want to thank you for your ongoing commitment to SITE, we simply would not exist if it weren't for you!

Thank you to all who participated in the annual membership survey, the survey results concluded that our members continue to see benefits and value from SITE programs, conferences, and networking. At the core of SITE and our mission, this is who we are. You've also told us that you would like SITE to continue offering programs and solutions that are geared towards learning technologies, instructional design and eLearning. There is no doubt that technology and the need for eLearning-based solutions continue to evolve within the insurance industry. Therefore, you can expect to see in 2020 a nice blend of programs, monthly webinars, and conference sessions focusing on these topics. It is also gratifying to see and hear from members via the survey of the desire to engage and volunteer in some way shape or form with SITE. Overall, I am very pleased with the survey results received by all members who participated.

I am excited to announce the continued efforts to launch SITE Podcast. If you recall, in the previous quarterly update we announced the ideation and development of the Podcast. I am happy to report that we are still on track and you can expect the first episode to debut this month in November!

I am also thrilled to announce the completion of our second round of the Mentorship Program. The mentor/mentee pairs concluded their 12-week program at the end of October. The Mentorship Program plays a critical role as it relates to Professional Development of SITE members. We are now accepting applications to participate in our third round of the Mentorship program. The deadline to submit as a Mentee or Mentor is Friday, November 22nd. I look forward to seeing your involvement.

It is also with excitement that I share that SITE's, Insurance Training Professional (ITP) designation is now listed among other top industry designations through the International Risk Management Institute also known as IRMI. Take a look! https://www.irmi.com/free-resources/insurance-industry-links/insurance-risk-certifications

Following the Fall in-person board meeting, your SITE Board engaged in a series of productive conversations that will benefit SITE so that we remain the premier professional organization of choice; dedicated to the insurance and training space. As a non-profit organization SITE has faced economic impacts of expenses largely caused by inflation. Therefore, you will see a slight change in annual dues for individual membership to $199 annually, from $125 annually.

I look forward to seeing you at our annual conference June 15 – 17, 2020 in New Orleans, at the JW Marriott. We are in the final stages of curating a phenomenal agenda, speakers and networking opportunities that I am confident will exceed your expectations. Remember, early bird registration is now open!

As always please contact me or any member of the Board of Directors with suggestions, feedback or just to brainstorm new ideas relating to SITE. I look forward to collaborating with you in the future.

Larry Nicholson
President, Society of Insurance Trainers & Educators
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813.892.3779

SITE News

Welcome New Members!

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

AIPSO/RI CPCU
Traci Adedeji

Alliant Insurance Services Inc
Jayme Moreno

AmWINS Group
Natasha Kreutzer

Federated Insurance
Kelly Maalis

Frost Insurance
Bentley Queen

IMA, Inc.
Lee Ann Vandervort

Kemper Insurance
Garnet Arroyo
Nino Blackshire
Patricia Cavazos Torres
Nathalie Dessources
Tina Fairley
Amber Grisinger
Clay Hammac
Dale Kendrick
Irene Lopez
Jennifer Love
Ara Martinez Linares
Ashley Minor
Robin White
Alexis Wood
Jennifer Yielding

Lincoln Financial
Marcus Barlean
Kim Bash
Jennifer Benskin
Adrienne Boney
John Borders
Denise Brown
Julie Bruni
Eric Buchholz
Stacey Couture
Tamara Dowling
Martin Drysdale
Amber Eppenbaugh
Joan Focht
Dan Gage
Vanessa Garcia
Lindsey Garrett
Candace Goodwin
Carmet Grandison
Hannah Growe
Tracey Hanley
John Hansen
Deb Holden
Dayna House
Jill Jansen
Jenifer Kilby
Amanda Kuder
Alice Lindsay
Marciee Middleton
Darren Muhammed
Joan Murray
Stephanie Norton
Courtney Novotny
Lauren Oliveira

Lincoln Financial cont.
Michelle Peters
Leif Rawson
Karen Rice
Megan Rock
Serena Seth
Lauren Sharples
Jackie Smith
David Stahl
Rhea Summers
Matt Warnke
Emily Welborn

PLRB
Martha Fitt

SECURA Insurance
Mary Underhill
Paul Wilke

Selective Insurance
Joel Handwerk

The Best IRS
Alcidez Andrade
Armando Andrade
Courtney Cooke
Julia Naumann
James Patterson
Ken Wittich
Jack Wood

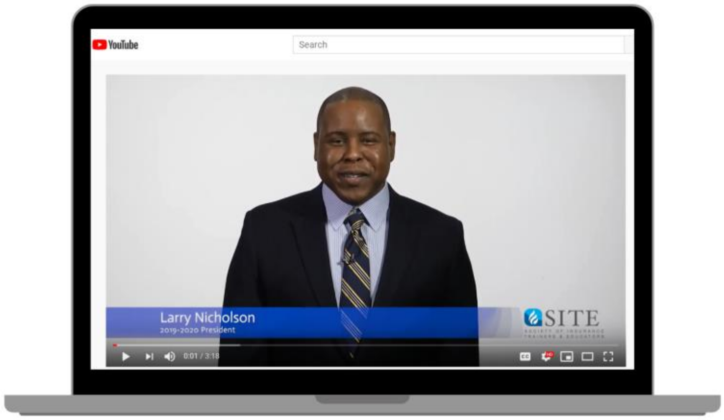
SITE Congratulates New ITP Designees

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

- Corrie Feavel, ITP - Delta Defense - September 2019
- Tai Williams, M.Ed., ITP - Texas Mutual Insurance Co - September 2019
- Stephanie Weakley, AINS, AIC, ARM, AIS, ITP - IMA Financial Group Inc. - September 2019
- Evette Durrah, ITP - Sedgwick Claims Management Services - October 2019

For a full list of our ITP's - please click here.

SITE News Cont.



Please click on the image above to watch a welcome message from SITE President, Larry Nicholson.

Mentorship

The next session taking place from January 6, 2020 - March 27, 2020, is now accepting applications.

Application Deadline: Friday, November 22, 2019
Welcome Kick-Off Call: Wednesday, December 18, 2019
Mentorship Session Dates: January 6, 2020 - March 27, 2020

Apply to become a Mentee
Apply to become a Mentor

The Mentorship Program is an initiative to connect SITE members with other highly motivated members who seek careers, career advancement and professional development in the insurance and training related industry. The goal of the Mentorship Program is to connect each mentee with a mentor (current SITE member) with the purpose of adding value and direction to the mentee's experience with SITE.

The mentorship program at SITE is designed to support the competencies focused in the SITE Train the Trainer program. The program supports SITE's mission statement of providing SITE member professional development through programs, networking opportunities, and services.

#WhyISITE

Personal stories are often one of the most compelling ways to convince others to become a part of something which is meaningful to your life.

Your SITE Board of Directors would LOVE for you to join the conversation about SITE on all of your social media platforms, Facebook, Twitter, and LinkedIn. Join the conversation with the **#WhyISITE** hashtag and tell all of your followers about your SITE involvement. Tell your SITE story, share your thoughts about what SITE has done for you, and let's get the conversation rolling about what's happening with SITE. Think back to when you joined. What motivated you to be a part of our organization?

Catch the excitement! Be part of the discussion on **#WhyISITE**!

SANDRA COLLEY
MBA, AINS, ITP

Learning & Performance Manager

Nationwide Insurance

My Workout Class Does Learning Better Than Most Organizations

I started a new workout class (name will be kept anonymous) and it hit me in the middle of the class, this workout class provides a better learning experience to meet today's modern learner than most organizations. Stay with me…

Here is how the class goes (roughly):

- You are assigned a machine before class starts so you know which rotation and machine you'll be on
- Class starts on time by getting a high five from the instructor and fun music playing to get you excited
- Every workout is different. While everyone is briefly warming up, the instructor starts talking everyone through the day's workout in about 2 minutes
- Throughout the class they give you cues and instructions in real time on when you need to move machines or change the workout
- Coaching occurs in real time if you need any assistance (i.e. when my form is incorrect)
- Meanwhile, everyone wears a device and everyone can see your heart rate and what zone you are in. The goal is to remain in a zone for so many minutes of the workout. When you stay in the desired zone, you get points. The goal is to get at least 21 points per workout.
- After the workout, everyone stretches in a circle and the instructor usually has some fun ice breaker questions and shares reminders for upcoming items
- After the class you are e-mailed a summary of your workout (heart rate, your points, etc.)
- Did I mention there is an easy mobile app to see all your stats from every workout?

So how does this relate to learning? Have you connected the dots? In case you haven't, let me share. Most organizations spend too much time providing individuals way more information than they need to do the task at hand. The workout class shows you can learn in real-time from the instructor and by watching others around you. You don't need an entire 30-minute setup. Many of us do the same modality or setup of training week after week and month after month. This workout claims that they never have the same workout twice. This means I know every time I go that I am going to have a new experience even though the outcome is the same (burned calories). The workout class also provides individualized coaching as needed. I know exactly what my heartrate is and how I am performing to everyone else at any point throughout the class. How many of us can say we provide learner data specific to them and their performance?

Then let's talk about post class. How many of us ever follow-up or provide reinforcement afterwards? This class sends me a summary specific to me and I am able to access all my prior sessions virtually at any time.

This workout class does: peer to peer learning, personalized learning, coaching, follow-up and is gamified. How many of us can say that about our learning programs?

They have even thought through motivation. Guess what, if you sign-up and do not cancel 24 hours in advance, then you're charged for that class. Let me tell you, that HAS motivated me to go on a Saturday morning after a late Friday night. Needless to say it is fun and that too is a motivator!

Great ideas for our learning programs are all around us. We need to open our eyes to all the possibilities for how we can meet our modern learner in the insurance learning space. I know I have taken away a few things from my recent experiences in my everyday world. Now it is just figuring out how to update and freshen up our programs to better align to learner preferences.

Sandra Colley is a Learning & Performance Manager for Nationwide Insurance. Her team delivers all training for the Claims Personal Lines Casualty and Material Damage organization. Recently her team has transformed the associate onboarding experience to an interactive and engaging virtual experience.

RICHARD HART
CPCU, CIC, AAI, AIC, CRM, ARM, ARE, AFIS, ANFI, SPPA, CPIA, ITP, AIT, AINS, CPPA, AIDA

Georgia Farm Bureau

Director of Sales Training

Teaching vs. Training

Differences and Similarities in Educational Focus

Teaching & Training. Both words have to do with instruction; both begin with the letter **"T"**; but have you ever wondered about the difference between teaching and training. In addition to my full time training role I am an adjunct professor for risk management and insurance courses at a local university. In preparing the coursework for undergraduates I was struck with the differences between teaching college students and job training. In my "day job" I am a subject matter expert and trainer for a mutual insurance carrier. My job is training individuals who are entering the insurance industry, particularly agents and customer service representatives. My goal is "training" them, to ensure that they can do the job they were hired to do. My role at the university is different in that I am 'teaching" students about risk and insurance. Here are some of the differences that I found between teaching and training:

Training is involved with the development of *knowledge, skills and abilities* in participants. These three topics are important as they frame the business purpose of training.

Teaching is involved with transferring *knowledge* to a learner. Knowledge transfer is the goal of teaching and not necessarily skills and abilities.

Knowledge. Both teaching and training deal with the transfer and assimilation of knowledge. This can be facts, techniques, coverages, contracts, processes and structures. Knowledge (in its simplest sense) is just knowing stuff; learning the information and facts. In teaching college students, I was challenged by the fact that most of them have no prior knowledge of the subject matter and need to start from scratch. My college students apply knowledge learned to take a test, after which the knowledge is not actively used. The employees I train apply knowledge learned in order to gain skills and abilities to succeed at their job over time.

Skills. Skills are what you can do using the knowledge you have gained. There is a difference between knowing stuff and knowing how to do stuff. I have never flown an airplane, but I have studied the principles of lift and read instructions on how the controls work. Merely having the knowledge does not mean I can fly an airplane. In the employee training environment, we stress building a base of knowledge from which to develop practical skills to actually do a job. These skills are incrementally developed through practice and simulations. In classroom teaching there often are no specified future tasks for which the knowledge and skill will be used. Therefore, in classroom teaching we tend to focus on knowledge alone. A challenge for the students I am teaching at the University is to find a way to leverage the knowledge they gain into future skills they can use when they begin their career.

Abilities. If knowledge is "knowing what to do" and skills are "knowing how to do it"; then abilities are "knowing how to use your knowledge and skill to get things done". For example, as a sales professional I have *knowledge* of my product (its features attributes and benefits) and of the sales process. I have *skills* in talking with people, focusing on body language and buying signals, and in taking prospects through the sales process.

But if I do not have the focus, discipline, work habits, organization, and drive to put it all together I may fail due to lack of *ability*.

My experience has been that I can transfer knowledge through instruction, develop skill through repetition, and instill abilities through coaching, inspiration, motivation and example.

- In a college setting I am teaching theoretical knowledge and a basis of understanding that I hope will be foundational when students begin their training in a particular role or job.
- As a trainer of professionals I teach relevant job knowledge, develop job-related skills and instill the ability to actually perform meaningful work and achieve business success.

In conclusion while I find that while teaching & training roles are similar, the goals of each role – academic as well as occupational – are different. Both roles are important, but learner success is defined differently in each role.

Richard Hart is Sales Training Director at Georgia Farm Bureau Insurance and an Adjunct Professor for Mercer University's Risk Management and Insurance program. He is a 40-year veteran of the P&C Insurance business who believes in what our industry can do to help protect people from financial disaster and provide meaningful careers for generations to come.

GREGG GOLSON
CPCU, ACS, AIC, AIM, AINS, AIS, API, CSM

J.S Held University at J.S. Held LLC

Vice President and Program Director

You Think Insurance is Boring?

While attending the 2019 CPCU Annual Meeting and Conferment in New Orleans, I decided to put on my training evaluation hat (in addition to eating 12,000 beignets and 4,367 oysters).

Here are the Top 5 Training Takeaways I observed:

1. **The best sessions all involved story-telling.**
   From Mike Massimino (NASA astronaut) to Bonnie St. John (she endured losing her leg at 5 and still became a champion skier). Even the non-keynote 'best' sessions involved storytelling. From our own SITE President Larry Nicholson regaling about his early mentors in insurance, to past CPCU President Mike Koscielny telling the audience about being the most 'experienced and seasoned' in his MBA program, stories set the standard. The closing keynote was even about storytelling, what a way to leave your audience with a WOW.

2. **Stories that involve 'grit' take it to the next level.**
   Mike Massimino told a heart-wrenching tale of how it took him four long agonizing attempts to become an astronaut. Then, he gave an example of a huge failure he had to overcome. His mantra, "Give yourself 30 seconds of regret, after a failure', rang true with all of the audience. There will be some training you present, that builds on other training, and in those instances give the attendees the why behind the training. Tell them how it will be used in their job. Better yet, have another attendee (or previous attendee) tell the audience how the training helped them solve a problem or led them to a promotion. In order to reach the next level, we have to push our attendees a bit. Let them know you are taking it up a level, so they can accomplish more.

3. **Leave the audience with a quote they'll never forget.**
   Bonnie St. John, Olympian, quipped, "Normal is overrated, aim higher." She does not hide her carbon-fiber leg; she is proud of it. What line can you give your audience when speaking on a more technical subject. My mentor and one of the preeminent Building Code experts in the country (William Bracken, PE), is often asked about matching when he does talks on replacement of damaged items. He quotes an acquaintance succinctly, "The Building Code doesn't care about ugly, it's about minimum safety standards". People will remember your mantra. What mantra or quote can you apply to your training to help the audience really remember your key point(s)?

4. **CPCU is both exclusive and inclusive.**
   It's an exclusive club, with a high-priced (based on all the effort to pass the tests) club to enter. But, once you are a member, it's ultra-inclusive. Let me explain. You are welcomed with open arms and have the opportunity to meet and be introduced to hundreds of other CPCUs at local, regional and national events. I've honed my training and presenting skills presenting with CPCU colleagues at the Leadership

Summit and also the Annual meeting. The application here for SITE members, leverage your SITE membership, attend the webinars, attend the local social event, sign up to speak with a SITE colleague to a local organization, reach out to your colleagues you attended Train the Trainer with. When you get to work with other great trainers, if you are paying attention, you always learn something you can apply and become an even better trainer.

5. **When attending any conference; you get out of it what you put into it.**
   I attended sessions, spoke up, took copious notes, talked to the speakers both before and after sessions. I also made it a point to meet at least 5 new people per day and introduce at least 5 people to people I knew. Lastly, I also took a few moments on the flight back to list my own top awards: best overall presentation and why, best PowerPoint, best handouts, most unique presentation method, best ice-breaker of all the presentations, for example. I next looked at my next 5 speaking opportunities to see how I could incorporate some of the prize-winners tips into action.

One extra tip, the top presenters always had a give-away or a follow-up tool. Whether they gave away a few copies of a book or wristbands, or had a follow-up paper you could write for, they gave you something physical to remember them and keep them top of mind. What small memorable item or follow-up paper can you leave with your training attendees to reinforce the training?

Fellow SITE member, I challenge you the next time you attend an event, put on your training analysis cap, create your own top-5, write up your own awards, and apply the best you see to your next training events. I'd love to hear back (and your boss would also) on how attending that conference will make you a better and more effective trainer.

By the way, our SITE Annual Meeting in 2020 in also in New Orleans, LA. Hope to see you there, I'll be the one with the SITE training tip mask on. **#SITENOLA**

Gregg Golson CPCU, ACS, AIC, AIM, AINS, AIS, API, CSM is Vice President and Program Director for J.S Held University at J.S. Held LLC. J.S. Held is a leading global multi-disciplinary consulting firm, respected for our exceptional success addressing complex matters around the world. You can view examples of J.S. Held LLC technical papers that can assist training your staff at https://jsheld.com/university.

HEATHER BLEVINS
CPCU, AIC, AINS, AIS, SCLA

State Farm

Change Management Analyst

Dear Insurance Companies: The Small Stuff Still Matters

One of my favorite life quotes is "life is in the small stuff." What does this actually mean? To me, it exemplifies the attitude one should adopt if you want to be successful at any arena in your life. Take care of the small things because in the end, those are the things people will most appreciate about you. We are given such a short time on this planet, and what we choose to do with this gift of time is our legacy. It's what people will remember about us. If we don't take the time for the "small things," in life, what is the worth of our existence here?

Maybe it will help if I define what I consider to be "small things" in life.

- A moment you take to hold someone's hand when they are experiencing a tragedy
- Taking the time to remember the little details which matter to others
- Offering your time to others selflessly with no expectation of return
- Doing one thing for another person which they can't do for themselves (AKA: paying it forward)
- Thinking before you speak or leap

Insurance entities could learn a lot from this life philosophy. With all of their big picture planning, wide-spread control of operations and recent restructure plans designed to save expenses, often the small things get lost in the shuffle. Focusing on the little things in business involves concentrating our attention on what is nurturing or sustaining to a company's mission. But how is this accomplished by a nameless, faceless entity like a gigantic insurance company? Bottom line is, it has to be more than platitudes, words thrown at an issue, engagement initiatives or tired company mission statements plastered and laminated on a cubicle wall.

And often, the training division of the company finds the responsibility of the "small stuff" on their shoulders. I know in my experiences as a trainer, it was just part of how we operated to embody the essence of things that I listed above in our every move. We lived the "small stuff" attitude day in and day out in training.

The "small stuff attitude" at the organizational level in a company requires action, backed by sincere intent and commitment, from the top of a company, to build the kind of culture in an organization which respects the things which are easily taken for granted or missed altogether. It requires empathy and compassion from leaders in a company which is reflected from the executive suite to the cleaning crew. It requires a company willing to realize when they have made some mistakes. It demands a company which is big enough to admit those mistakes openly and then move forward with humility and grace. What it doesn't require is more of the same tired old initiatives, packaged up with a little bit of a different name, designed to force engagement from employees who have heard the same thing countless times before. If you want true, meaningful commitment from your employee's, please remember to back up your words with actionable steps. The small stuff in a corporation is exemplified through the following actions.

- ***Help your employees when they experience tragedy – including when your company undergoes a mass transition and loses talent and experience.***

Remember your employee base which remains is essentially losing friends and people they care about to transitions. And while the gesture might be appreciated, ice cream parties cannot and will not make them "feel" any better about these situations. Managers dancing through the aisles passing out candy and chili cook-offs in July don't change the reality of what those "left behind" are processing. Often, these halfhearted actions have the opposite effect of causing frustration and consternation among your employee base. That might be why you see some mass cheerleader eye-rolls and hear sighs when you walk through the cube farms passing out Hershey's and Reese's Pieces.

Don't expect your employees to be agile immediately when you place them in unfamiliar places. An expectation of immediate agility is a very rigid response to a fluid circumstance which EVERY SINGLE EMPLOYEE experiences differently. Help them to navigate the emotional toll of drastic, massive change by being honest and not glossing over the reality of the grief your employee base may be experiencing. Train your managers to be sensitive to these issues as they relate to performance in a department. And don't punish those managers when their "results" slip during times fraught with overwhelming circumstances of change.

D. Michael Abrashoff, award-winning author of the book, "It's Your Ship," has the following advice which insurance companies would be mindful to follow, "Leadership is mostly the art of doing simple things very well." Doing those simple things very well starts with how you treat your people in crux moments in your corporation. Remembering to acknowledge and empathize with your employee's experience during times of difficulty is an excellent starting point for the small stuff attitude.

- ***Take the time to remember the details about your employee base.***

I will never forget a claim manager I once worked for because she never forgot a name or face, no matter how much time passed in between the time she spent with you. She not only remembered your name, she knew your children's names, your spouse's name and even your favorite pet's name. She remembered your last vacation you chatted about going on months before and would bring it up the next time she met you. She was a master at remembering details in the "little people's" lives. And guess what? She didn't have Anne Hathaway following her around like Meryl Streep in the Devil Wears Prada prompting her with the details of the people she would meet because she was "above them." She just KNEW you and genuinely cared about making sure you KNEW it. This kind of attitude is what the "small stuff" is all about in a large company. Unfortunately, with the massive technologic and logistic upheavals in insurance companies today, this kind of manager/director at most levels is so far removed by the big picture problems, they don't have the time to focus on what might really matter to retaining their best talent. So, word of advice here, let your higher level management and even department executives engage with the "little people." Give them the grace and the time to do so!

- ***Offer your time selflessly with no expectation for any return.***

People need to know their leaders are willing to do what it takes to make sure to get the hard work done. I remember days back in a centralized claim environment when we were down to 25% of our normal staffing due to most of the employee and some of the management base being "deployed" to work a mass hurricane event. Those times were tough. We were all tired, working long hours in the call centers before and after our normal shifts. Yet, we got the job done. And I attribute our "can-do" attitudes to the fact that our upper-level management actually showed the right example. We were backed up with massive amounts of work, people's patience with the workloads were wearing thin, yet upper level management was able to inspire everyone in that operation to dig in and make a difference in the workload with weekend overtime work.

HOW in the world did they create that buy-in? First, it was because their employee base believed they were actually contributing to results versus output (or numbers) for an organization, and get this, we actually DID. Second, management didn't throw down directives ordering people to work non-optional overtime in an operation. They showed up and were there to work right beside their employee base. This effort included first, second and third line leadership. After those catch-up weekends, employees were convinced management was willing to do anything for them selflessly and had no explicit expectation for return. They showed up, dug in, and worked as servant leader's right next to their teams. This action was simple, but the results were far-reaching and impactful.

- ***Do one thing for your employees which they can't do for themselves (AKA: pay it forward).***

Most of you have probably seen the blockbuster 2000 film *Pay it Forward* starring child actor Haley Joel Osment. *Pay it Forward* is a poignant film about a young boy named Trevor McKinney who lives in a deeply troubled home with an abusive, yet absent father and an alcoholic mother. His social studies teacher, Mr. Simonet, gives his class an unusual assignment: think of something to change the world and put it into action. Trevor dreams up the idea of repaying good deeds done to three new people. The film is a tough one to watch because in the end, Trevor's matchless, selfless love for others is what brings his demise. Spoiler alert here for those who haven't taken the time to watch this film, but it tears at the heartstrings pretty hard. Bring your Kleenex.

Insurance companies have the opportunity to pay it forward unlike any other company out there today. And imagine how the public persona can be swayed by the power of pay-it-forward actions? Insurance is an integral necessity in every segment of every single market, and they are filled with the people working for them who make the "magic" of the company come alive in real time. One of my co-workers made this statement to me: People MAKE this company happen.

A company's best pay-it-forward moments often appear in the small things they do for their employees and their communities. Getting behind your employee base being involved in pay-it-forward actions is one of the ways a company can show their loyalty to inspiring a "small stuff" attitude. Employees need this kind of connection to their communities, and all corporations are in a unique position to help their employee base to be a part of something greater than themselves.

Trevor McKinney in the film explains it simply why I believe so many corporations are not able to do this in today's climate," I think people are too scared, or something. I guess it's hard for people who are so used to things the way they are- even if they're bad- to change. 'Cause they kind of give up. And when they do, everybody kind of loses." Companies cannot give up on the people who make the daily operations happen, and leadership within our insurance corporations needs to set the tone that they are not willing to "give up" on investing in their employee base! Pass it on, pay it forward!

- ***Think before you speak or leap***

To me, this is the basic principle of considering the ramifications of your actions and your words prior to making reactionary decisions. Unfortunately, insurance companies today are often facing mass crises of talent, experience and operational upheaval to centralized operations. It's not a shortage of workers, it's a shortage of talent in the areas where companies have decided to move their crucial operations. And this loss of talent causes further disruption to normal, daily operations in all facets of a company.

So how do you stabilize in these times of flux? My first suggestion is to slow the pace of mass change (think before you leap). Your employees and your public image many times is viewed in the light of a reactionary response of throwing ideas at a wall to solve problems. The spaghetti which is being thrown, just doesn't stick.

Often, these “ideas” are not innovative, well thought-out or planned, nor are they helpful when an organization is experiencing the crisis of change.

My second suggestion is don’t be arrogant or believe you know it all. And most of all, don’t continue to charge forth on paths which are not well-lit or supported by the proper infrastructure. (Think before you speak or leap again). Yes, you’ve managed to be successful for extended periods of time, but what’s your challenge in being successful today? Could it be you may have put the proverbial cart before the horse in trying to advance too quickly to automation without any support structure which has been tested or proven? What is really driving the issues behind your loss in market share? Maybe, unfortunately, it’s not the performance or actions of your employees, it’s you. Maybe the customer base you once served is “breaking up” with you because they can see and hear what is going on in their communities of which you are no longer present? Maybe your actions are viewed negatively because unfortunately you are at the brink of losing the faith of the masses because you’ve ignored the “small stuff” for too long.

My suggestion for fixing these issues in large insurance companies are very simple. Go back to your roots! Yes, gigantic insurance companies, you are able to fix this, but you have to start at the granular points in every level of your organization. Focus on the right actions, and show those actions in every move you make every day. Start small and work from there. Build a family-orientated culture in your massive corporation around the small stuff. Corporate CEO’s, don’t be afraid to reinvent your leadership style! The sum of all of the small things you do as the leaders setting the tone and vision will pay off massive dividends. Meet with and know the “small people” in your organization. Because in the end, they will be the ones to turn the ship around.

Heather Blevins began her career in insurance with State Farm in 2004. She currently works as a Change Management 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 was recently elected to serve 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.*

December 10th at 2:00 p.m. EST - *Creating Effective Claims Scenarios to Teach Insurance Coverage*
with Crystal Uebelher, Secura

December 20th at 11:00 a.m. - *Explaining Insurance Using Common Terms*
with Michael Constantine, The General

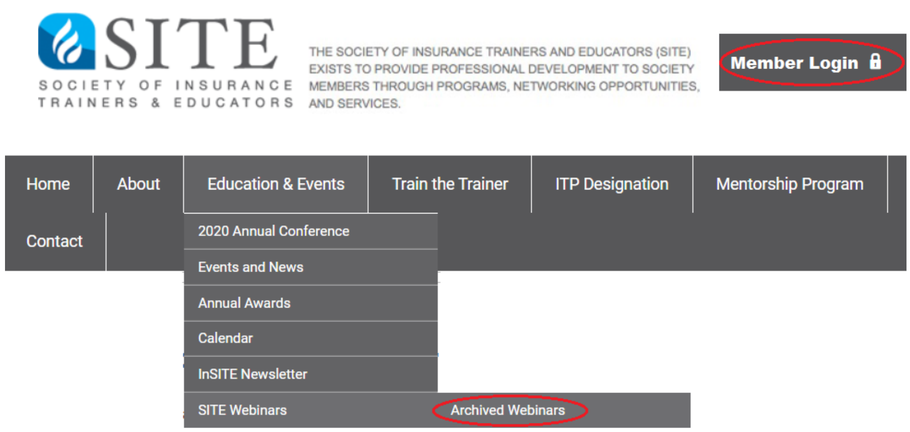
Archived Webinars

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. After each webinar we upload to this page, so come back and visit often.

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 fixes.

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



SITE Socials

Chelsea Walters, Evelyn Jorgensen and Kimberly Levitt at the Charlotte, NC SITE Social this past October.

Would you or your organization like to host a SITE Social near you? Interested hosts should contact office@insurancetrainers.org to set up a date and location near you. Socials can even be held in conjunction with an upcoming industry conference.

2020 SITE Annual Conference

The SITE conference this year in Memphis was exciting, dynamic and impactful. Make your plans to Learn and Lead in the Big Easy today! We can't wait to connect with you there!

JW Marriott New Orleans
641 Canal Street
New Orleans, LA 70130

SITE has secured a special reduced rate of **$179 per night for SITE attendees** (Standard Guest Room). All rooms are subject to hotel service fees and taxes. Make your hotel reservations directly with JW Marriott New Orleans by calling 504-525-6500. Be sure to mention you are with SITE and make your reservations **by Friday, May 22, 2020** to receive this special reduced rate. Reserve Your Room Today!

Learn more about our Keynote Speakers and Learning Labs.

Ready to sign-up? Registration is now open! Access early-bird pricing by signing up through December 31st!

Concurrent Sessions, Learning Labs & xSITE Talks
We're still looking for YOUR presentation to finalize our 2020 course offerings. SITE is accepting RFPs through **Thursday, November 21st** for our 2020 conference. We also welcome non-members to present at the conference. To learn more about these opportunities, click here.

Exhibit & Sponsorship Information

If you have never exhibited at SITE, this is an excellent opportunity for you to meet with clients and important new prospects, attend informative presentations and see what is new in our industry. If you have exhibited in prior years, you already know that this is a great business opportunity.

SITE remains committed to providing access for our vendor partners to our membership. The SITE Annual Conference is an important way for you to reach them and demonstrate your support of their professional association. Learn more about our Sponsorship and Exhibitor packages.

Why Train the Trainer?

Are you new to training, need more knowledge on adult learning theory and instructional design, or are just looking for a way to hone your facilitation skills while meeting learning professionals just like you? If you answered yes to any of the above, then SITE's Train the Trainer program is for you! SITE has partnered with The Institutes to fill a much needed gap in the market and provide you with a valuable and industry recognized certification. The live component is a day and a half workshop designed to interact with peers and instructors, practice your skills and get valuable feedback.

Train the Trainer is real world focused. As you work through the online material you will create a training module to present at the live workshop to demonstrate your mastery of the content and receive valuable feedback.

Topics covered online include:

- Understanding adult learning fundamentals
- Analyzing the need for training
- Designing for instruction
- Developing instructional materials and activities
- Delivering instruction
- Creating evaluations

Train the Trainer helps sharpen your skills. The 1.5-day live session completes your learning. In addition to presenting your learning content, you will participate in breakout activities to enrich your classroom management and presentation skills. Click here for more information.

Upcoming Train the Trainer Dates

March 31 - April 1, 2020

National Interstate Insurance Company
3250 Interstate Drive
Richfield, OH 44286

Suggested hotels in the area can be found here.

Online Registration - Train the Trainer - March 2020
Registration Deadline: February 3, 2020 (Participation is limited to 15 attendees)

June 13 - 14, 2020

JW Marriott New Orleans
641 Canal Street
New Orleans, LA 70130

Hotel information can be found here.

Online Registration - Train the Trainer - June 2020
Registration Deadline: April 20, 2020 (Participation is limited to 15 attendees)

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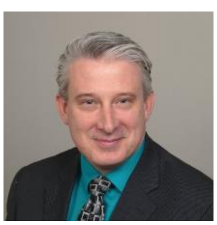

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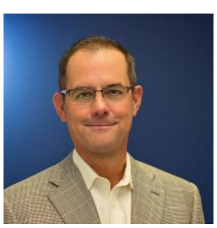

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