

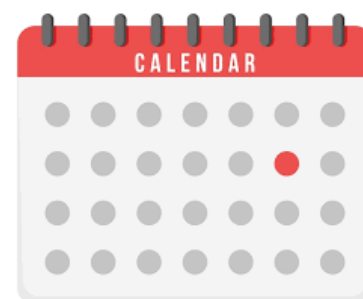
InSITE



THE SOCIETY OF INSURANCE TRAINERS AND EDUCATORS (SITE) EXISTS TO PROVIDE PROFESSIONAL DEVELOPMENT TO SOCIETY MEMBERS THROUGH PROGRAMS, NETWORKING OPPORTUNITIES AND SERVICES. CLICK [HERE](#) TO LEARN MORE.

Q3 2023 NEWSLETTER

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PRESIDENT'S MESSAGE

We are back!

Mike Koscielny MBA, CPCU, CIC, AIS, API,
INS, SITE President

Hello SITE Members, Guests, and Friends,

The Phoenix has risen from the ashes!

Or as Mark Twain once said, "Reports of our death are greatly exaggerated!"

SITE is alive, well, and flourishing thanks to the combined efforts and will of our board.

As with many businesses and organizations, the Pandemic was hard on our organization. The challenge we faced was two-fold. One, financial and the second, was the need to switch from in-person to virtual. I am proud to say that both issues are well behind us now and we are poised for a rebirth.

2021 through 2023 were pivotal for us, but we rose to the challenge. We took our flagship offering, Train the Trainer and took it virtual. We conducted 5 sessions and trained 44 SITE members. The transition to virtual allowed us to offer the course more often than in the in-person mode. I can testify to the benefit of the virtual offering, as I completed that in July of 2021. The benefit of this is more trained SITE members using those new skills in the daily work requirements.

In addition to the Train the Trainer course, we pivoted to virtual webinars. We conducted 11 in 2021 and 8 in 2022. For the first time we partnered with the CPCU Society opening our webinars to CPCU Society members. It gave us some new presenters and opened the world of SITE to CPCUs. This has continued in 2023.

We even conducted an annual conference in 2022 virtually, which was well attended and received very positive feedback.

Special thanks to Sandi Ciccione, Kathy Cox, Heather Blevins, Mario King, Nick Hart, and the rest of the board for making this happen.

Early in 2023, I accepted the opportunity to lead SITE. Since 2021, I have been very impressed with everyone I met. Our board needed to be rebuilt. I sent an appeal to all members, and you responded. I asked Patrick Wraight, current Past President, to help interview the candidates. I am proud to say Patrick presented a slate of board members that I am confident will continue the SITE mission to serve our members. I want to thank all that have served on the board and those who are joining us now.

We have big plans for the remainder of 2023. We will continue our successful virtual Train the Trainer and Webinars. We are exploring the possibility of conducting an in-person conference this year. We are also exploring the possibilities of partnering with other organizations in a joint conference.

As always, our goal is to meet the needs of our members. Our mission is clear: **The Society of Insurance Trainers and Educators exists to provide professional development to Society Members through programs, networking opportunities and services.** If there are programs or services we need to consider, please feel free to reach out to me at Michael.koscielny@born2lead.net.

I am excited about the future of SITE and our new board gives great confidence that future will be even better than in the past. It is hard to improve and a good thing. My hope is we tweak it to make it even better.

Your 2022-2023 SITE BOARD



While I'm considered a subject matter expert, I am more interested in continually learning. I learn something every time I teach and that delights me.
 - Gin Brockwell, VP Programs

"Watching it 'click' into place motivates me. Even if you have been in the industry for decades, you can always learn something new because the industry is rapidly changing."
 - Kristen Brazzel, Secretary

Learn more about us [here!](#)

Upcoming SITE Events & Webinars

FALL 2023 TRAIN THE TRAINER!

WHEN: October 30 to November 15, Monday, Tuesday, Wednesday, 12pm to 3pm EST

KICKOFF CALL: September 25, 12pm EST

FACILITATOR: Mary Bruggeman



Mary Bruggeman joined Great American Insurance Group in 2005. Prior to this she worked for State Farm in the field handling complex auto claims. At Great American she worked on a Casualty claims team, holding positions of increasing responsibility, including Casualty Claim Manager for the division. In 2008 Mary moved internally to Corporate Claims to found the Claims College. She has responsibility for the technical Claims College offerings, the Claim Trainee Program, the Claim Mentorship Program, P&C Claims intranet and secured sites, and other professional development and resource programs for the organization's claims staff.

Mary graduated from Miami University in Oxford, Ohio with a Bachelor of Science, double majoring in Economics and Human Resources. She earned her MBA with a focus in International Business from Xavier University. She has several designations from The Institutes, including her CPCU, AIC and AIC-M, AU, AIM, AIS, AMIM, ARM and ARM-P, ARe, and ASLI. She also holds the Society of Insurance Trainers and Educators (SITE) Insurance Training Professional (ITP) designation.

In October of 2019 Mary was named Insurance Professional of the Year by the Cincinnati CPCU Society. Mary has presented at both the SITE (Society of Insurance Trainers and Educations) and PLRB Conferences. Mary lives in Cincinnati with her husband Mike and their three children, Joseph (12) and twins, Thomas and Kate (9). Mary and Mike lived in Europe for two years after they were married, and as a result, Mary loves traveling and all types of food! She enjoys spending time with her family and hiking the National Parks.

Upcoming Webinars

SEPTEMBER:

“Effective Insurance Instruction for Adults” - Chris Burand
 September 8, 2023, 12-1 Eastern time

Join us as SITE welcomes Chris Burand to the virtual stage! Chris is a nationally recognized speaker, author and has over 30 years of consulting experience within the property and casualty realm. We are thrilled to have an hour of his time as he shares his experience with adult learning. This webinar will help YOU learn how achieve the results you want in your training and facilitation sessions.

Register [here!](#)



Chris Burand has more than 30 years' experience providing consulting services for the property & casualty insurance industry and is recognized as a leading industry consultant. His mission is to help his clients, carriers and distributors, achieve their goals through bespoke solutions. Cookie-cutter/consultant speak approaches are not winning solutions. He takes great care in learning clients' goals, understanding their needs, and developing an executable solution for their specific situation. Chris has a unique analytical ability that enables him to get to the bottom of issues and provide the insight necessary to create specific solutions for each situation.

Chris is a Certified Business Appraiser (CBA), a designation earned from the Institute of Business Appraisers. The CBA designation is only earned by those who prove they have a high knowledge of business appraisals including applicable tax law and case law.

He is also an approved E&O auditor, certified E&O seminar provider, E&O expert witness, and has written a book on how to avoid E&O claims.

He has designed many carriers' contingency and agency compensation plans and been a consultant to carriers regarding their strategic agency relationships.

Chris is a nationally recognized speaker and author. He has been a featured speaker at more than 400 seminars and educational programs. He is a monthly columnist for The Insurance Journal, a past columnist for American Agent & Broker, and his articles have appeared in Rough Notes, The National Underwriter, A.M. Best, and many regional insurance publications. He also publishes Burand's Insurance Agency Adviser for independent insurance agents.

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www.burand-associates.com

OCTOBER:

“Wake Me When It's Over! (Why So Many Presentations Suck and Yours Don't Have to) - Greg Gray
 October 13, 2023, 12-1 Eastern time

Greg is an internationally renowned expert on leadership, sales, relationship building, and customer experience. His keynotes, seminars and workshops have electrified and empowered tens of thousands of people in more than 500 cities across America, the Caribbean, Europe and the Pacific Rim.

Greg's blend of humor and real-world, practical ideas on leadership, service, and relationship building are receiving rave reviews from clients that run the gamut of Industries and Associations. Greg's success can be attributed to his consistent themes of personal responsibility and profit through service!



NOVEMBER:

“Practical Approach to Insurance Education - Teaching Students How to Translate Technical Knowledge into Useful Tools in Their Roles - Retail, Wholesale, Underwriter, Claims & Risk Control.” - Sue Flom, CAIB & Kelley Wade

November 10, 2023, 12-1 Eastern time

Sue is the Director of Product and Learning Development at SPG - Specialty Program Group. In her own words, she uses her over 20 years of experience with marketing, PR, sales, data-base reporting, and administration to facilitate the success of those in her company. She is a veteran instructor and is well known for her teaching and leadership styles.

Kelley is the Talent and Organizational Development Leader at SPG - Specialty Program Group. She, too, is a veteran of the industry with instructional leadership experience both in P&C and Financial. She has been recognized for her exceptional team management and her warm, engaging facilitation style.

DECEMBER - Stay Tuned!

JANUARY

“Everyone Leads: The Role of Self Assessment in Leadership” - Scott Prickett

January 12, 2023, 12-1 Eastern time

Scott is the author of Respectership: Because Every Business is a People Business. His diverse leadership experiences include time as an army officer, corporate manager, business owner and non-profit executive. Scott is an attorney at law and his represented numerous business owners, investors and other professionals in addition to his extensive courtroom experience.



Registration for October - January webinars will be available soon!

SITE SHOUT-OUTS!

Become a SITE Mentor!

We will be asking YOU to be a mentor! Keep your eyes on your inbox for this next great opportunity through SITE.

SITE Calls YOU to Host a Webinar

Recently we conducted a survey for member input and asked some questions about interest in hosting a webinar for SITE. Unfortunately, we neglected to ASK those who were interested in presenting a webinar for

their names and email addresses! Big OOPS on our part. If you indicated your interest in hosting one of our SITE webinars, please contact Kathie Cox or Sandra Ciccione at kcox@seajams.com or ciccione@theinstitutes.org

This is an excellent opportunity to share your expertise and expand your professional network and build your resume as an insurance training professional. You can have your voice in a SITE webinar!



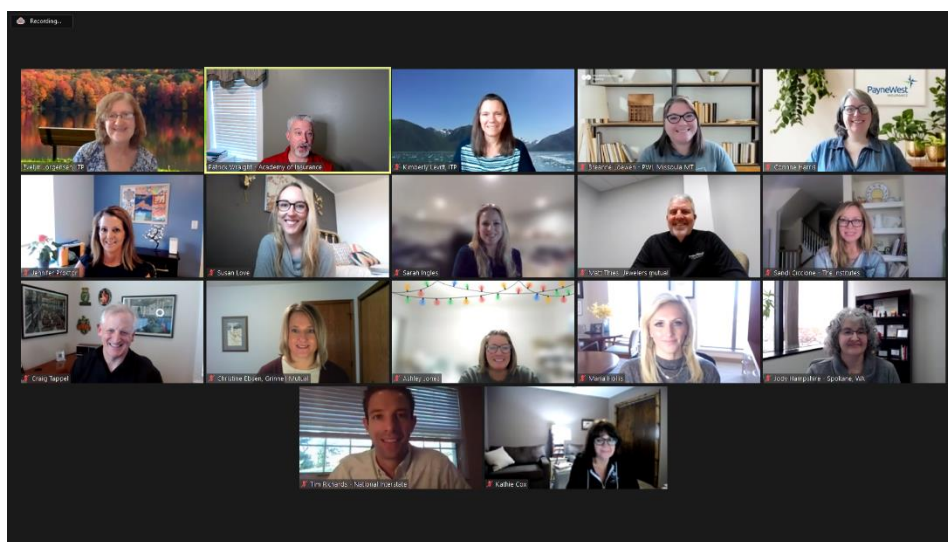
Train the Trainer Excitement!

-Evelyn Jorgensen

JOIN US IN CONGRATULATING OUR 2022 TRAIN THE TRAINER GRADUATES!

Please join SITE in congratulating the Fall 2022 Train the Trainer graduates. This was the largest class since we started delivering the program virtually since the pandemic. It was truly enjoyable, for both attendees and facilitators alike! In addition to gaining knowledge and practice as well as their TTT certificate, these individuals are one step closer to obtaining their Insurance Training Professional (ITP) designation.

Interested? Check out <https://www.insurancetrainers.org> for more information on both the Train-the-Trainer program and the ITP designation.



From left to right:

Evelyn Jorgensen - SITE TTT Facilitator, Patrick Wraight - SITE TTT Facilitator, Kimberly Levitt - SITE TTT Facilitator, Breanne Loewen - PayneWest, Corinne Harris - PayneWest, Jennifer Proctor-Strategic Comp, Susan Love - PayneWest, Sarah Ingles - FBFS, Matt Thies - Jewelers Mutual, Sandi Ciccione - SITE TTT Co-Producer, Craig Tappel - Hub International, Christine Ebsen - Grinnell Mutual, Ashely Jones - PayneWest, Maria Hollis- Strategic Comp, Jody Hampshire - PayneWest, Tim Richards - National Interstate, Kathie Cox - SITE TTT Producer

Training the Trainer is going strong in 2023! Let's also take a moment to recognize our 2023 graduates to-date!

IMA Exclusive 2023:

Aimee Tanner, Thea Lim, Holly Avritt, Maeriah Case, Tabitha Phillips, Lee Ann Vandervort, Caroline Wriston, Kristen Sisk

Winter 2023:

Diane Baker, Virginia "Gin" Brockell (SITE Board Member), Kody Duckels, Lauren McDonald, Stefanie Michele, Tiana Salsman, Tredessa Travers

July 2023

Tyler Abbott, Kristen Brazzel (SITE Board Member), Kerry Busniak, Amber Christel, JoElyn Dern, Shawni Jackson, Jennifer Paqueo

From all of us at SITE,



Congratulations!



Heather Blevins, M.Ed, CPCU, ITP

Project Coordinator

State Farm

Uniquely Human Skills

The insurance industry is evolving at what feels like both a snail's pace and as fast as the speed of light. There is a crisis of capabilities we are recognizing with the advent of technologies and capabilities in our industry, though, and we often wonder, - will robots replace us all? Our jobs are evolving, and people are changing, and that can be frightening, right? What is it about US HUMANS that makes us so darn important to the insurance mechanism?

It is our ability to be *uniquely human* and exercise the uniquely human skills which are crucial to the survival of our industry.

Insurance is a people business. And it ALWAYS will be. Even when the robots come. AND THEY ARE HERE AREN'T THEY?

AI, machine learning, chatbots, oh my! The inundation of what seems like risky technology at times seems to be presenting a conundrum to us. How do we integrate the "human touch" with these collaborative technologies in a way that both meets the customer's expectations for their experience, and allows the people in insurance to focus on the most important aspects of work in the insurance ecosystem? We do it by realizing the power of uniquely human skills and exercising them at every touchpoint we have with customers, both internal and external to our organizations. And uniquely human skills are not easy for those of us in the training industry to "teach," but it can be done.

The "people" business we are in may look quite different in the future, and we may interact with people differently in the new world we are entering, but "people skills" will very much be a part of who we are and what we do in the future. And the people skills all of us who are in the industry have worked so diligently to develop, hone, and refine over the

years will be critical as we ride out the wave of disruption into the future. Rest assured, the fact that you can deny a claim and have the customer thank you at the end of the conversation will be vital to the future of our world. The ability to be able to teach that kind of empathetic conversation will be vital to our training staff in insurance. The fact that you know how to make sure an 89-year-old customer understands their settlement will be important in the new world. Teaching the care and compassion you need to help that 89-year-old navigate complicated insurance policy contract language and understand you are HERE for them, is a skill set all trainers and educators in our industry must learn.

In recent years, various individuals have raised questions about whether technology disconnects human beings from one another or strengthens relationships. Of course, there are applications like FaceTime, Teams, SLACK, Facebook, Twitter, Meta, Instagram, TikTok, etc., but there are also concerns about whether individuals are losing the ability to connect without devices. On the other hand, many relationships have come into inception due to technology and various social networking platforms. We must remember that even in the digital world, there are capabilities we all must build relationships, and that all comes down to our ability to have meaningful relationships with other people by utilizing our uniquely human skills and working on them continuously! Trainers are shackled with the lion's share of modeling this behavior for those in their training classes but modeling that behavior and demonstrating it through your training practices is the first step towards success.

So, what are "uniquely human skills?" These are skills which are only exclusive to humans and our connection with other human beings. Here are the top three:

- Communication
- Empathy
- Resilience

Communication is key. The ability to translate and connect an impactful message to others is part of our ability to be uniquely human. Skilled capabilities in communication are definitively one of the most important uniquely human skills we have. And communication skills are not just our ability to keep talking and keep the conversation moving. One of the most powerful communication skills, and the most uniquely human skills we have is our ability to listen. Our ability to actively listen to others, and to hear deeply and empathetically the message someone is trying to tell us, has become especially important in the world we are living in today.

Think about a time when you had to actively listen to someone, whatever your job role might be, and what that looked like. Ponder that now. What did you do? Did you express empathy with your listening, or did you just try to solve the problem? Because in our industry, many times we are just focused on what?

Solving the problem versus listening for the meaning someone is trying to relay to us.

And when that happens, what we have is a failure to communicate. - just as good ole Cool Hand Luke says.

Think about how powerful our capabilities are with this uniquely human skill in our industry- since we truly serve a noble purpose, and our ability to connect, with capable communication skills, will separate us from the robots that they keep promising are taking over our world!

Empathy is never a more powerful skill in leaders and individuals in our industry today. And it is even more important in the training realm, as people are learning new skills with us, or just learning about insurance for the first time. Top companies across industries agree that empathy is the most important leadership skill. However, while it may be easy to be empathetic with friends, expressing vulnerability at the workplace may feel like a weakness. Afterall, you may feel that your livelihood is on the line or in competition with others for recognition or promotion.

Moreover, empathy in action means putting another human's needs ahead of your own, which can feel like a detriment in today's competitive corporate atmosphere. And that is where we get empathy wrong.

Let me re-enact an exchange from Simon Sinek for you about empathy with just a few changes for our industry- insurance.

--We do NOT practice empathy many times in our worlds. The question is, what does empathy look like?

Here is the lack of empathy, and this is unfortunately normal in our world of fast-paced metrics and task completion. This is a synopsis shared in a sketch that Simon Sinek illustrated in one of our talks, but is has been modified to show a typical conversation in our industry today.

You walk into someone's cubicle and say, "Your metrics for adherence and wrap up time with phone calls have been down for the third month in a row. YOU must pick up your numbers otherwise I can't guarantee what the future will look like." How inspired do you think that person is to come to work the next day?

Here is what empathy looks like. You walk into someone's cubicle and say, "Your metrics for adherence and wrap up time with phone calls has been down for the third month in a row, are you ok? I am worried about you. What is going on?"

We all have performance issues. Maybe someone's kid is sick, maybe they are having problems in their marriage, maybe one of their parents is dying. We don't know what is going on in their lives, and of course it will affect their performance at work.

Empathy is being concerned about the human being not just their output.

We need to practice empathy, regularly, in all our interactions with others. In our process-driven, micro-structured worlds in insurance, this is never more important than it has been in the past.

Resilience. We talk about this quality in our industry often, but how exactly is it built? What I can state is resilience is definitively NOT built inside of vacuum, free from troubles or insulated from conflict.

Resilience is defined as the capacity to recover quickly from difficulties, what I like to call "grit moments."

The absence of tough moments in our lives does not help us in any way to become resilient. And who reading this can raise their hand to some tough moments in our industry lately? Who in our training profession has had some struggles with the massive

shifts in how learning is delivered? Who can identify with the struggles, the difficulties, the frustrations, and the setbacks? How are you managing that while you get through it? Because how we manage these moments will define how much resilience we can build through them.

Resilience is a resulting learned quality of enduring challenges which binds itself to our daily human existence and becomes an integral part of our souls and personalities once we have experienced the life circumstances which build it. And boy, building that resilience layer, it is going to challenge us to the furthest extent of what we believe we can handle. Resilience is our ability to bend and not break.

Do we have the grit to tough through these moments? Are we relying on our training partners in the industry to help us through? It is going to take some challenging times to figure that out, and I believe it's a journey which never really stops. Right here in SITE, in this great organization, you have a community of people who are prepared to help you grow through what you go through. Tap into that.

And it's often the stories of resilience building that help us to understand it's importance as a uniquely human skill and going through those moments, those tough times, and coming out a little bent, but not broken, allows us to look at the next challenge, and the next challenge beyond that with different eyes.

Here's where the story of resilience becomes very real for me, and I will admit that there is a professional speaker - look her up- Meg Johnson-who tells this story much better than I do, but I tell you this story of the emergence of a butterfly because it demonstrates to me the power of resilience in our lives as humans.

Does anyone know that when a butterfly emerges from their cocoon, that they cannot fly immediately? They are covered in the muck and mess of the cocoon they have been in for weeks/sometimes months on end, and they must wait for their wings to dry to fly. They are first a caterpillar, crawling along, living life as they always would, and no one ever really asks them if they want to turn into a butterfly. Then suddenly, they are thrown into this cocoon for a while, and they come out all soggy and feeling like they don't know who they are.

Moments like that in our lives build resilience. The moments of CHANGE in our lives, the forced changes that come to us that we just don't know what to do, or where to go, those are the moments of metamorphosis for us, but they are also the moments where we are building our ability to be resilient. We have all had those moments of forced change, of trials, of difficulties. You have all been through them through the recent pandemic as training professionals.

Just know you are a butterfly going through that metamorphosis in those moments, and you will have a better view of the world than when you were a caterpillar crawling along the ground when you come out of those moments. Butterflies teach us the power of regeneration, and the power of finding yourself and your ability to adapt and be resilient. Many of you may have experienced the same things, but I can guarantee you all that it is worth the fight to get out of the cocoon.

Capitalize on your uniquely human skills, communication, empathy, and resilience-building because when you can harness the power of these skills, you can truly fly!

Heather is a passionate, creative, problem-solving maverick who loves to prove that her wild ideas work. She loves sunsets, getting lost when she travels, and the power jolt she gets from capturing the stories that dance in her head. She currently serves as Vice President of Marketing for SITE, Vice-Chair of the Publications Committee for the CPCU Society, and Immediate Past President of her local CPCU Chapter. Heather has a M.Ed. from the University of Illinois, and has earned the CPCU, AIC, AIS, AINS, SCLA and ITP designations. Her day job in insurance is with State Farm serving as Senior Project Coordinator in Operational Strategy and Modernization within P&C Underwriting.



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