

# InSITE



## Q1 NEWSLETTER

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## PRESIDENT'S MESSAGE

WHAT A YEAR WE HAVE IN STORE!

Patrick Wraight CIC, CRM, AU, AINS  
SITE President

Dear SITE Members, Guests and Friends,

As we continue to face this new year, we consider where we are and where we've been.

In the last two years, we have not been able to come together in person, yet we've met virtually many times.

We have made several internal changes that have allowed us to operate on the tightest of budgets so that we can better serve our members.

We have taken our flagship course (Train the Trainer) from a 16 hour in person class to an interactive, virtual event that has been able to draw participants into the conversation around their own learning and the skills that we all bring to the training world.

All the while, the world around us has shifted, changed, and many have experienced the ups and downs of personal and professional change.

What a ride it has been.

What does the year ahead hold? Only time will tell, but this new year brings with it the expectancy of better things. We read of the great resignation like it's a bad thing, but if people are leaving jobs perhaps, they are doing so because there's something better for them on the horizon. It could be that they are leaving work that doesn't speak to them so that they can fulfil something that aligns better with their calling.

What does all this have to do with SITE?

I see a bright future for SITE. A future where we work together to uplift the world of insurance training and education higher. I see those of us that work in the agency space, those who work in the carrier space, the independent consultants, and those in higher education come together to help the insurance world get ready for the future of insurance.

I'm not the one that says that the future of insurance is in the tech space, but I am saying that insurance and technology will have to become better integrated. I am saying that those of us in the insurance learning world can be the guides that the insurance world needs to aid them in their implementation of technology.

We aren't writing the story of insurance in the 21<sup>st</sup> century, nor are we the hero of the tale. We are the guides in the story, helping the insurance world move forward into what's next.

I'd like to ask you to come along with us. The insurance world needs your help. You are already helping so many to do their jobs better. Why not add your strength to ours? If you're a SITE member, bring your voice and your strength. SITE needs you to volunteer and get involved in how we're moving things forward. We have teams that need your help.

Reach out today to anyone on the board. We'll be glad to help you to help others.

PS - Some of the places we are looking for help include presenting webinars, writing for our newsletter, website administration, bookkeeping, planning our conference, and more.

# SITE News

## Your 2021-2022 SITE BOARD

Check out our webpage for your [2021-2022 Site Board here!](#)

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## 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](mailto:kcox@seajams.com) or [ciccione@theinstitutes.org](mailto: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!





ANGELA M SEPTER

RANJINI MALHOTRA

Learning and Performance Consultants

Nationwide Insurance

## Back to Basics: Creating Learner Centric Training Using Merrill's First Principles

As we near the 20-year anniversary of the publication of Merrill's First Principles, it only seems right to pay homage to a design framework that has stood the test of time despite revolutionary technological advancements. How learning is designed and developed has changed over the last twenty years, but the one thing that has remained the same is the fundamental way adult humans are wired to learn. Merrill's First Principles speak to this constant in a learner centric way. By learner centric, we mean designing the learning in a way that allows the learner to play an active role in their own learning. This is different from the instructional methods of the past that forced learners to take on a more passive role. By proposing a design framework that puts the learner at the center of the learning, Merrill has provided instructional designers a map for designing learning that transcends modality. This article discusses why this framework is so effective and suggests several practical methods for implementing each principle.

### Principle 1: Learning is promoted when learners are engaged in solving real-world problems

Think about some of your most memorable learning experiences. What are the things you know and do well, and how did you get to be knowledgeable in those areas? Chances are the examples in your mind right now aren't of specific one-time training events or required computer-based courses. Maybe it was an internship you participated in when you were fresh out of school. Maybe there's some challenge or adversity you've faced during your life that forced you to increase your competence in a particular area. Wherever your strength and expertise lie, it's likely there for a reason - that learning helped you to meet or navigate a real-life problem or need. Adult learners are self-directed learners, and our desire to learn is often directed by the benefits we perceive will come from upskilling or growing in a certain area. This is why it makes sense that engaging learners in real-world problems, scenarios and issues would be not just an effective but a memorable way to facilitate learning.

Several years ago, the authors of this article were part of a group of designers that developed a learning program on negotiations for casualty claims associates. The goal of the training program was to enable claims associates to be more effective in their negotiations with claimants and attorneys, so in order to engage the learners in the training, not only did we weave in real-life negotiations opportunities that mirrored the information, supports and documents the associate would have back in their role, but the training also included a problem-based, Choose Your Own Adventure style computer-based training (CBT) course designed and built by one of our peers. The course allowed learners to collaborate in groups as they worked together to attempt to achieve the best outcome possible in a challenging negotiation scenario. The activity mimicked those real situations learners might face on a daily basis and helped to deepen their problem-solving skills in a relatable and relevant way. We'll talk more about this particular training and its ties to Merrill's framework as we look further into his remaining principles.

## Principle 2: Learning is promoted when existing knowledge is activated as a foundation for new knowledge

Have you ever been working or involved in a discussion on one topic and then been asked a question regarding a completely different and unrelated topic? It can sometimes take a couple seconds to mentally switch tracks. We ask a lot of our brains, and they oblige us, but as instructional designers, it's our job to make the transition from one line of thinking to another as easy and seamless as possible. Merrill's second principle speaks directly to this responsibility, as it encourages designers to build that mental transition into the learning by priming learners for new information. Designers can do this by bringing to the forefront of learners' minds related, existing knowledge that will help make the transition and receipt of the new knowledge easier.

With regard to our prior negotiations course example, activation of existing knowledge was achieved through the incorporation of a negotiations style analysis that functioned as pre-work for the learning. This negotiation style analysis was reviewed and discussed at the very start of the formal learning event, in an effort to provide learners with an existing mental model on which to build. Other methods of activating existing knowledge include opening the learning with a relevant news article, story or video clip or with an assessment or focus on the WIIFM (what's in it for me?).

## Principle 3: Learning is promoted when new knowledge is demonstrated to the learner

If you've ever seen the first Harry Potter film, you'll likely remember the scene in which Harry and his cohorts receive their first flying lesson. For those who haven't seen it, it essentially goes like this: the professor welcomes them to class, informs them they'll be receiving their first flying lesson and then says, "Well, what are you waiting for? Everyone step up to the left side of their broomstick...", and with that, the students are thrust into the application portion of the training. The professor talks them through the remaining steps necessary before instructing them to begin. Needless to say, the training goes awry. Outside of missing the activation piece, this scene portrays the absence of another vital part of effective learning - demonstration. How much more effective might this class have been had the professor had a broom of her own to demonstrate each step and to allow them to progress through the skill in a scaffolded fashion? Merrill's third principle calls out the importance of demonstrating the new content to the learner to provide them with a context and idea of how best to approach application of the learning, once they're ready to put the information or skill into action.

In our negotiations training example, demonstration was achieved through a fishbowl-style negotiation in which learners observed coaches roleplaying a negotiation. This mastery modeling of the desired information and skill level provided learners with an example of how to utilize the strategies and information that had been shared and provided an illustration of what an effective negotiation might look and sound like. Other methods for incorporating demonstration into your learning include through storytelling, podcast, peer job shadows or visual walk throughs of how to navigate a specific process or system.

## Principle 4: Learning is promoted when new knowledge is applied by the learner

In the Harry Potter example, Harry received plenty of opportunity to apply his newly learned skill. As a "seeker" on a Quidditch team, he had multiple opportunities to master the art of flying on a broomstick in pursuit of the golden snitch (a small round, flying orb whose capture would win the game). Application of knowledge benefits the learner by aiding in retention and promotion of the learning. In this principle, learners apply their knowledge to solve problems. This affords them the practice needed to retain and master the new knowledge. Application is achieved through exercises, role play, activities or any task that closely resembles what the learner would be required to do on the job. Application provides the opportunity to practice and try out new knowledge and skills as they solve the problem.

In our Negotiations course example, learners applied the techniques they had observed, as demonstrated by the facilitators, coaches and their peers, in their own negotiations. New knowledge was integrated through role play activities and through the aid of a visual Job Aid for post-training reinforcement. Learners demonstrated the newly gained skills in a role play in which they negotiated a claim settlement with the coach or facilitator, applying the new knowledge (negotiation techniques) to solve a problem (negotiating a claim settlement).

Other application opportunities include scenario-based group activities or other collaborative activities, case studies, discussion boards, assessment questions, immersive learning and learner-led activities like teachbacks.

### Principle 5: Learning is promoted when new knowledge is integrated into the learner's world

Merrill states that learners “have integrated instruction into their lives when they are able to demonstrate improvement in skill, to defend their new knowledge, and to modify their new knowledge for use in their everyday lives.” (Merrill, 2002, p.8). This is achieved through being able to demonstrate that new knowledge to others, reflecting upon the new knowledge they have gained and creating additional new knowledge by building upon the existing knowledge (Merrill, 2002, pp. 8-9). Harry Potter was able to quickly master broomstick flying through his participation in the regular Quidditch sporting events where he had to skillfully demonstrate his expertise, and was often given challenging, life-threatening situations in which his broomstick flying ability was honed and improved. Fortunately, it's usually not a life-or-death situation for modern learners, but integration does help build the learner's confidence and aids in skill improvement and mastery.

In the Negotiations course example, the new knowledge was integrated through the role play activities in which the learners demonstrated the newly gained skills. Learners were able to reflect upon their performance within the negotiation through an activity in which they were able to record what they felt went well and where they felt they had opportunities. Finally, learners built upon the existing knowledge by watching peers complete their role play - this provided them with additional insights and approaches to add to their repertoire for approaching negotiations.

Integration can also be achieved through post-training learning activities that include peer feedback opportunities, job shadows, memory boosters, or other post-training activities that help to combat the forgetting curve.

### Conclusion

As instructional designers, our primary obligation is to the learner; by designing learner centric learning, we provide better learning outcomes and can demonstrate the value of learning to our business partners over time. Although the way we consume learning has changed and will continue to change, one thing remains constant - the learner must be at the center of any learning design. Merrill's First Principles can be viewed as a comprehensive framework for designing learner centric learning. It can be applied to virtually any modality or type of learning and ensures that performance outcomes are driven with the learner's needs in mind, resulting in learning that is engaging, relevant and most of all, impactful in driving business results.

### References:

Merrill, M. D. (2019, April). *First Principles of Instruction*.

Wordpress.com. <https://mdavidmerrill.files.wordpress.com/2019/04/firstprinciplesbymerrill.pdf>.

*Angela Septer and Ranjini Malhotra are both Learning and Performance Consultants for Nationwide Insurance. They each hold Masters of Science degrees in Instructional Design and Learning Technology from Franklin University and have been in the learning and development field for six years.*



Heather Blevins, M.Ed, CPCU, ITP

Project Coordinator

State Farm

## How Mr. Miyagi Carried Me Through Grad School

Anyone else a fan of the original Karate Kid movie? I know, I am asking you to stretch out your thoughts back to 1984, when Ralph Macchio was a lot older than he looked in the film, and an Asian man changed our thinking about a lot of things through some quirky sayings. I went back to college as a seasoned adult to obtain my master's degree in Education in 2019. As I pondered this crazy adventure, I kept reflecting back on the power of Pat Norita's quotes in that film as the character Mr. Miyagi. His wise little quips pretty much carried me through grad school as a full-time working adult. The top five quotes he had which allowed me to focus in on this journey I decided to take myself on follow:

### *1). Staying busy when things are chaotic in your life is often a good way to achieve focus.*

As I stumbled through the pages of reading, the peer reviews of other classmate's papers and presentations, the endless writing, I found myself laser-focused on accomplishing goals to complete my schoolwork during the week. As Mr. Miyagi so quaintly put it, "Focus Daniel-son." Learning this all-important skill might be one of the best things you can do with your life whether you are returning to grad school or just trying to balance life and work. Focusing on accomplishing the task at hand through attention to detail, time management and completing & accomplishing goals is key to success when things are busy and crazy in your life. Trust me, I know. I spent hours writing every night for grad school, but taking moments to write for pleasure whether it be newsletter articles for LinkedIn or articles for various insurance journals, I was able to find an outlet for creativity that kept my eyes on the prize.

### *2). Quality is often valued over quantity, but quantity is often the name of the game in the educational arena.*

I've often wondered why grad schools feel it necessary to pile on thousands of pounds of work to their students. I believe it all boils down to the idea that if you can sort through a ton of work in a timely manner, you are competent in critical thinking and time management skills. Which, if you don't have these, you will not succeed in the grad school arena. Mr. Miyagi puts this as: "Man who catch fly with chopstick, accomplish anything." Funny and quirky little saying, but it puts to test the task of quality over quantity. It takes quality (focus and attention) to accomplish the goal of catching a fly with chopsticks. Have you ever tried to do this? IT'S HARD! Seems like most of what I did in grad school involved attracting flies with fly paper versus catching them with chopsticks, but you get my point. You must be able to express the quality of what you do, even if quantity is the desired result, especially in the post-graduate educational arena. Maybe I had the opportunity to experience "beginner luck" like Daniel-san through this experience.

### *3). Wisdom is not gained in the educational arena. It is gained through experiencing life.*

Book smarts go a long way in this world, but wisdom gained from street smarts or life circumstances will actually carry you much further and develop your ability to be flexible, agile and adaptable to all of the crazy circumstance's life throws at you. Don't be fooled into believing some kind of special wisdom is going to come from learning a lot of "information" in the educational arena. Wisdom is the application of the concepts you

have learned to REAL LIFE. Mr. Miyagi again stated: "Lesson not just karate only. Lesson for whole life. Whole life have a balance. Everything be better." The lessons I learned in grad school may not have given me wisdom, but they gave me perspective, which in turn will gave me balance to achieve that most-sought-after wisdom in the application of the concepts in life.

4). *"Daniel-san, lie become truth only if person wanna believe it."*

Don't lie to yourself when you try to take on a big task or project, or major accomplishment. You are not doing yourself any favors in creating delusional thinking through the process. The work you do towards whatever major goal you are attempting to accomplish in life will often not reap the incredible accolades and rewards you expect right away, but you will see the downstream effects of your ability to stay focused on the task at hand, and push through the difficult times. Just like Daniel when he attempted to learn the crane kick. It was a PROCESS!

My charge to all of our readership is that achieving balance in the pursuit of big things requires work, sweat and yes, even a few tears.

But the JOURNEY is worth the effort, and who you become on that journey is more important than the destination!

*Heather Blevins began her career in insurance with State Farm in 2004. She currently works as a Project Coordinator in Operational Strategy and Modernization. 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, is the President of her local CPCU Chapter, and serves on various other insurance industry board committees. On a personal note, she enjoys writing, college football and traveling the world.*

## Upcoming Events

### Interactive Virtual Roundtables & Webinars

**April 8, 2022**

[Check IN: Return to the Office: Pros, Cons and Everything In Between](#)

Join us for this FUN and ENGAGING SITE Interactive Virtual Roundtable at **12PM EST April 8, 2022.**

Has your organization gone “back to the office?” To what extent will the “remote” workplace exist going forward? There have been arguments for and against each, but how can we provide the best of each, whether our work is in-person or virtual?’



Join Kathie Cox and Sandi Ciccione in an interactive discussion on these questions and more. We look forward to hearing your thoughts on this important topic. Please bring examples of how you and your workplace are dealing with these challenges! ’

## Webinars

### Who Do You Think You Are? A Rebel’s Guide to Personal Branding

Join this webinar upcoming in May to learn from our Vice President of Marketing, Heather Blevins, about a rebel’s journey towards personal branding. This session will be interactive and engaging and will provide you with some insight as to how to start your own personal branding journey. **Register for this event today below!**

**May 13, 2022, 12-1 Eastern time**

[ZOOM Registration](#)



## SITE Train the Trainer Program!

The Spring session for SITE's Train the Trainer program is in full swing. Every seat at the virtual table was taken! SITE's Vice President and Director of Programs, Sandra Ciccione and Kathie Cox, have been working to update the content and continue to streamline our virtual offering for this valuable program. If you missed the Spring Session, NO worries! Dates for the fall session will be announced soon! Don't miss your chance to have a seat at the table.

In the meantime, check out this information about the [Train the Trainer program](#) from our webpage!

## SITE Future

We all know that we MISS seeing each other in person. Your SITE Board is working hard as a member-only run organization to figure out a way to bring our membership together again, and we are setting our sights on 2023 for that opportunity. **We need YOUR help to grow if we are going to make this happen.** We challenge all of you, remember those good times that we had at our conferences and SITE events? Have you shared that experience with someone you know to encourage them to be a part of this great organization?

We are asking all SITE members to engage with us on our social media platforms but especially our [LinkedIn](#) account, and encourage others to get to know and become a part of our organization. Re-share and engage with our posts here, and help us to spread our message!

We are looking forward to getting back to in-person events just as much as you. Help us to make that happen by engaging someone you know to join our organization, take the Train the Trainer Program, or complete their ITP designation. If you have suggestions for SITE that would help us to grow and engage our communities of insurance trainers and educators, please email us at [office@insurancetrainers.org](mailto:office@insurancetrainers.org) or message us on LinkedIn.

## #WeAreSITE





## 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:

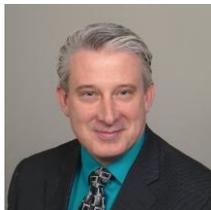
  - Learning objectives
  - Training techniques/methodologies utilized
  - Copy of an evaluation tool which assesses the training and/or instructor
- ✓ **Length of Time as a Training/Education Professional**
  - Demonstrate five years' experience as a training/education professional.



ITP checklist and application available at:  
[www.insurancetrainers.org/itp-designation](http://www.insurancetrainers.org/itp-designation)

Questions? Contact us at [office@insurancetrainers.org](mailto:office@insurancetrainers.org)

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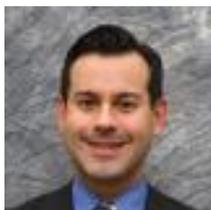
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