

# LEARN & LEAD IN THE BIG EASY



*Society of Insurance Trainers & Educators Annual Conference*  
*June 15-17, 2020 | JW Marriott | New Orleans, Louisiana*



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## WHY THE **SITE CONFERENCE** IS **FOR YOU!**

**S**ITE's Annual Conference is the only conference that is catered to learning professionals in the insurance industry. At no other learning conference, will you be able to meet individuals who understand exactly the same matters that you run in to on a day to day basis. Additionally, you can share best practices and learn from these like-minded professionals and take back valuable insights immediately to your organization.

The 2020 SITE Annual Conference taking place at the JW Marriott New Orleans, June 15 – 17 in the historic French Quarter of New Orleans, LA, has quality and timely content that will assist with the direction and needs of your learning department. At this year's conference, you'll learn:

- Instructional Design and eLearning for Insurance Trainers
- Learning Technologies for Insurance Trainers
- Coaching Techniques for Insurance Trainers
- Innovative and Engaging Ways to Present Coverage Training
- xSITE Talks, Learning Labs and Interactive Roundtables

The above are just a sampling of the quality content you will discover at the 2020 SITE Annual Conference. This program brochure provides full descriptions on each session. We look forward to seeing you in June!



**Brandon Huff, MS Ed, ITP**  
*SITE Vice President of  
Annual Conference*



**Larry Nicholson, MBA, MS-RMI**  
*SITE President*

# 2020 SCHEDULE OF EVENTS

## SATURDAY, JUNE 13

8:00 a.m. – 5:00 p.m. SITE Train the Trainer  
(Pre-registration required)

## SUNDAY, JUNE 14

8:00 a.m. – 12:00 p.m. Train the Trainer, continued  
(Pre-registration required)

3:00 p.m. – 6:00 p.m. Registration Desk Open – 3rd Floor

4:00 p.m. – 4:30 p.m. Volunteer Meeting

5:00 p.m. – 6:00 p.m. Pre-Conference Networking Event  
Held at Ile de France - 3rd Floor -  
JW Marriott New Orleans

## MONDAY, JUNE 15

7:30 a.m. – 8:15 a.m. First Timers Breakfast  
We welcome all First Timers to this  
breakfast to network and get insider tips on  
how to make the most of your conference  
attendance.

7:30 a.m. – 8:15 a.m. Attendee Breakfast

8:30 a.m. – 8:45 a.m. Conference Welcome  
Larry Nicholson, MBA, MS-RMI - SITE  
President & Brandon Huff, MS Ed, ITP - SITE  
Vice President of Annual Conference

8:45 a.m. – 9:45 a.m. Opening Keynote Presentation  
**The Ripple Effect – Leading with Impact &  
Influence**  
Amy Franko – Impact Instruction Group

10:00 a.m. – 11:15 a.m. Concurrent Sessions

11:15 a.m. – 12:15 p.m. Attendee Lunch

12:15 p.m. – 1:30 p.m. Keynote Workshop  
**Elevating Relationships: The Power of  
Social Capital**  
Amy Franko – Impact Instruction Group

1:45 p.m. – 3:00 p.m. Concurrent Sessions

3:15 p.m. – 4:30 p.m. Keynote Presentation  
**5 Things to Know About Your Place in the  
Future of Training**  
Joel Appelbaum, CPCU, CRIS, ARM, AIS –  
International Risk Management Institute

4:30 p.m. – 6:00 p.m. Exhibit Hall Reception

7:00 p.m. Dutch Dine Around  
Locations: TBD

## TUESDAY, JUNE 16

6:00 a.m. – 7:00 a.m. Morning Activity/Fitness

7:30 a.m. – 8:15 a.m. Attendee Breakfast

8:15 a.m. – 9:30 a.m. Keynote Presentation  
**Network Beyond Bias: Making Diversity a  
Competitive Advantage for Your Career**  
Amy Waninger, CPCU, AIDA, AIT, AIM, AIC,  
AINS, CIDM – Lead at Any Level

9:30 a.m. – 10:15 a.m. Roundtable Discussions

10:30 a.m. – 11:45 a.m. Concurrent Sessions

11:45 a.m. – 1:30 p.m. Lunch on Your Own – Explore New Orleans!

1:30 p.m. – 5:00 p.m. Learning Lab: Ethical Influence:  
A Pillar for Success and Happiness  
Brian Ahearn, CPCU, CTM, CPT, CMCT –  
Influence PEOPLE  
(Pre-registration required. Additional fee:  
\$125)

Learning Lab: ExperienceInnovation™ | Learn  
Rick Menchaca - ExperiencePoint  
(Pre-registration required)

Learning Lab: New Way to Present Coverage  
Training – Concept by Concept, Not Line by  
Line  
Jim Chaney, MS, CPCU, ITP – Haag Education  
(Pre-registration required)

## WEDNESDAY, JUNE 17

6:00 a.m. – 7:00 a.m. Morning Activity/Fitness

7:30 a.m. – 8:30 a.m. Attendee Breakfast

8:30 a.m. – 9:45 a.m. xSITE Talks

10:00 a.m. – 11:15 a.m. Concurrent Sessions

11:30 a.m. – 12:45 p.m. Annual Business Luncheon

1:00 p.m. – 2:15 p.m. Keynote Presentation  
**Effective Policy Training: Leading Your  
Organization to Greater Success**  
Storm Wilkins, Esq., CPCU, ITP – Temple  
University

2:30 p.m. – 4:00 p.m. Closing Keynote Presentation  
**Preparing Student Focus via the Manager  
– How to Get a Classroom Full of Active,  
Focused and Interested Students**  
Carl Van, ITP – International Insurance  
Institute, Inc.

# KEYNOTE PRESENTATIONS

## The Ripple Effect - Leading with Impact & Influence

*Amy Franko - Impact Instruction Group, LLC*

**MONDAY, JUNE 15, 2020 | 8:45 A.M. - 9:45 A.M.**

**H**ow do you gauge if your leadership (and your training) will create lasting impact and influence? No matter your role, you make hundreds of decisions each day, ranging from the mundane all the way to the complex and life-changing. Imagine each decision as a drop, creating a ripple effect on those around you. A ripple effect of results in your organization and beyond.

In this leadership keynote, Amy Franko shares the 5 key leadership dimensions that today's organizations need to consciously cultivate and embed in learning and development. When you build these dimensions, you'll build an organization of leaders



who show up in a more courageous and impactful way. Today, and for the future success of your organization.

Participants will be prepared to think more strategically and operate more intentionally in today's business climate. They'll walk away with specific actions to elevate their ripple effect, within their organizations and beyond.

*The core messages of this keynote include:*

- The 5 key leadership dimensions: Agile, Entrepreneurial, Holistic, Social, and Ambassador.
- Specific strategies to build each dimension, that will also equip participants to incorporate into their training programs.
- Relevant stories and examples of where these 5 dimensions impacted organizations, customers, and the greater community.

## Elevating Relationships: The Power of Social Capital

*Amy Franko - Impact Instruction Group, LLC*

**MONDAY, JUNE 15, 2020 | 12:15 P.M. - 1:30 P.M.**

**I**n today's world, we're hyper-connected, just one or two clicks away from virtually anyone in the world. But what determines our impact isn't quantity of connections. It's the quality the relationships we build and the social capital we create. Social capital is your most valuable investment; it determines the results and impact you're able to create. When we make a consistent investment in building social capital we can create greater value, more loyalty, and stronger results – both within our organizations and with our customers. The content covered in the session includes:

- Social capital defined, and the key attributes of high-value relationships
- The key relationship types needed to reach significant goals
- A framework for identifying and building your network ecosystem
- Strategies that will improve your strategic relationships and influence
- Developing your action plan to make forward progress in building strategic relationships

## 5 Things to Know About Your Place in the Future of Training

*Joel Appelbaum, CPCU, CRIS, ARM, AIS - International Risk Management Institute*

**MONDAY, JUNE 15, 2020 | 3:15 P.M. - 4:30 P.M.**

**T**echnology is changing the game in the insurance industry. Learn how to navigate the moving pieces and what to look forward to in future trends.

- How technology is effecting the insurance industry
- Why our industry needs to do more training, not less
- How to navigate the moving pieces

- Insurance industry training needs
  - ♦ Social Media
  - ♦ Artificial Intelligence
  - ♦ Predictive Analytics
- What to look forward to in future trends
  - ♦ Chatbots



# KEYNOTE PRESENTATIONS, CONTINUED

## Network Beyond Bias: Making Diversity a Competitive Advantage for Your Career

*Amy Waninger, CPCU, AIDA, AIT, AIM, AIC, AINS, CIDM - Lead at any Level*

**TUESDAY, JUNE 16, 2020 | 8:15 A.M. - 9:30 A.M.**

Is your professional network as diverse as the workforce and community around you? If not, you could be missing important opportunities for your career and your company. Learn about the challenges we all face in making meaningful connections, the impacts of these missed connections, and how to recognize and overcome them. This session will help you remove the artificial barriers that may be keeping you from your next mentor, star hire, or big customer.



## Effective Policy Training: Leading Your Organization to Greater Success

*Storm Wilkins, Esq., CPCU, ITP - Fox School of Business, Temple University*

**WEDNESDAY, JUNE 17, 2020 | 1:00 P.M. - 2:15 P.M.**

Insurance policies are the lynchpin of the industry. It is what underwriters write, producers sell and claims handlers adjust. The better your organization understands its policies, the better they will be able to serve your customers. Therefore, effective insurance policy training is critical.

The best policy trainers are not just great trainers, they are great leaders!

- They take initiative on their own.
- They mastermind and create plans.
- They learn all the time.
- They show persistent continuous action towards definite goals.

By doing these things, they help to lead their organization to greater success. This session will discuss some of the hallmarks of effective policy training and inspire you to aim higher in your coverage classes.



## Preparing for Student Focus via the Manager - How to Get a Classroom Full of Active, Focused and Interested Students

*Carl Van, ITP - International Insurance Institute*

**WEDNESDAY, JUNE 17, 2020 | 2:30 P.M. - 4:00 P.M.**

Ever have a training class where people show up unfocused, uninspired, and thinking the class will not benefit them? Even worse, they see the class as an interruption to their day?

How would like it if people showed up with the desire and the expectation to learn? What if they came ready to take notes, realizing their job is to learn while in your class? What if they came seeing the class as part of their job, and not an interruption? What if they came with an assignment to learn something that they were actually going to apply when they return to their office?

Sound a little too good? Not at all. How people show up to your class is out of your control, but completely within the control of their managers. All the managers need, is a little help from you.

Most trainers get frustrated with managers who send their people to class without any inspiration. When trainers try to talk to

the managers about it, the trainers get frustrated because the managers themselves sometimes have an indifferent attitude toward training. That's usually because the manager has not been held accountable for his/her people's performance in class.

In this session, Carl Van, ITP, President & CEO of International Insurance Institute will demonstrate how to show managers that they are the ones who have been accepting mediocrity out of their employees by not inspiring their people to improve themselves. You will learn the right way to connect with managers, and learn to avoid saying the things managers hate hearing.

He will also show a simple way to justify the investment of training to the bean counters in the organization.



# LEARNING LABS

## New Way to Present Coverage Training - Concept by Concept, Not Line by Line

*Jim Chaney, MS, CPCU, ITP - Haag Education*

**TUESDAY, JUNE 16, 2020 | 1:30 P.M. - 5:00 P.M.**

For decades, the traditional way to teach coverage provided by an insurance policy has been to start with the first paragraph of the first page and work your way through the policy in the order that it appears. One problem with that technique is that insurance policies don't always place related concepts next to each other. This session uses the ISO Businessowners policy as an example of reordering the course outline to fit the coverage analysis thought process. Discuss direct physical loss or damage first, then define covered property and then talk about covered causes of loss. After that, discuss coverages provided by the policy that are outside of the basic insuring agreement, such as all the various business income related coverages. We will also explore a different way of presenting the most common endorsements. In this Learning Lab, participants will not only have an opportunity to discuss and fully understand this method of presenting coverage training, but they will also have a chance to develop a new piece of training using this method.



## Ethical Influence - A Pillar for Success and Happiness

*Brian Ahearn, CPCU, CTM, CPT, CMCT - INFLUENCE People*

**TUESDAY, JUNE 16, 2020 | 1:30 P.M. - 5:00 P.M.**

A large part of your professional success and personal happiness depends on your ability to ethically influence people; to get others to say "Yes!" to you and your initiatives. Did you know there are scientifically proven ways to make that happen? Using decades of research from social psychology and behavioral economics, attendees will engage in a variety of activities to learn:

- The difference between ethical influence and manipulation
- How to set the stage for more effective influence using persuasion
- 7 scientifically proven principles of persuasion
- The best ways to influence people based on personality type

\*Additional fees required. (\$125)



## ExperienceInnovation™ | Learn

*Rick Menchaca - ExperiencePoint*

**TUESDAY, JUNE 16, 2020 | 1:30 P.M. - 5:00 P.M.**

Participants are guided through the essentials of a typical four-month innovation project in a highly engaging and one-of-a-kind simulation, which gives you a safe space and structured method to practice human-centered thinking. You'll leave the workshop able to immediately tackle your organization's own innovation challenges.

Participants will learn:

- The design thinking process and how it's applied to solve innovation challenges
- How to adopt the daily mindsets and habits of a human-centered thinker
- Hands-on and "safe" practice of the key tools and techniques of the design thinking process
- How to be customer-centric and gain a deep understanding of what your customers really want and need



# 2020 COURSE OFFERINGS

## MONDAY, JUNE 15, 2020

8:30 a.m. - 8:45 a.m.	<b>Conference Welcome</b>		
8:45 a.m. - 9:45 a.m.	<b>Keynote: The Ripple Effect - Leading with Impact &amp; Influence</b> Amy Franko - Impact Instruction Group, LLC		
<b>Concurrent Sessions</b>	<b>Instructional Design</b>	<b>Learning Technologies</b>	<b>Professional Development</b>
10:00 a.m. - 11:15 a.m.	My Driveway Moments in Learning & Performance Sandra Colley - Nationwide	Culture Change as a Response to Increased Automation in the Workplace Guy Sellwood - Prosell Learning Ltd	How to Build a Powerful Personal Brand Larry Nicholson - Gulfstream Property & Casualty Insurance Co. & Abi Potter Clough - AbiLeads
12:15 p.m. - 1:30 p.m.	<b>Keynote: Elevating Relationships - The Power of Social Capital</b> Amy Franko - Impact Instruction Group, LLC		
1:45 p.m. - 3:00 p.m.	Creating an Impactful LinkedIn Learning Profile & Social Media Heather Blevins - State Farm & Chianti Tinsley - Primerica	Managing Copyright and Fair Use Issues in Training Art Carvajal - WebCE	Insurance Elevator Pitch Mary Bruggeman - Great American Insurance Group
3:15 p.m. - 4:30 p.m.	<b>Keynote: 5 Things to Know in About Your Place in the Future of Training</b> Joel Appelbaum - International Risk Management Institute		

## TUESDAY JUNE 16, 2020

8:15 a.m. - 9:30 a.m.	<b>Keynote: Network Beyond Bias: Making Diversity a Competitive Advantage for Your Career</b> Amy Waninger - Lead at Any Level		
9:30 a.m. - 10:15 a.m.	<b>General Session: Roundtables</b>		
10:30 a.m. - 11:45 a.m.	Building the Bridge: Moving Them From WOE to WOW! Linda Herodes - West Bend Mutual Insurance & Kate Manthey - University of Wisconsin - Oshkosh	Virtual Facilitation/Zoom Sarah Braga - Nationwide & Maria Barnes - Nationwide	Coaching Techniques for Trainers Lawanda Hall - Intelligent Intentions, LLC
1:30 p.m. - 5:00 p.m.	<b>Learning Labs</b>		
	New Way to Present Coverage Training - Concept by Concept, Not Line by Line (Pre-Registration Required) Jim Chaney - Haag Education	Ethical Influence: A Pillar for Success and Happiness (Pre-Registration Required) - Additional \$125 Brian Ahearn - Influence PEOPLE	ExperienceInnovation™   Learn (Pre-Registration Required) Rick Menchaca - ExperiencePoint

## WEDNESDAY, JUNE 17, 2020

8:30 a.m. - 9:45 a.m.	<b>xSITE Talks</b>		
10:00 a.m. - 11:15 a.m.	Microlearning Robyn Defelice - Revolve Solutions, LLC	Human-Centered Design Rick Menchaca - ExperiencePoint	From Idea to Implementation: Developing a Plan for Training & Education Lynda Carter - Competitive Edge Consulting, Inc.
11:30 a.m. - 12:45 p.m.	<b>Annual Business Luncheon</b>		
1:00 p.m. - 2:15 p.m.	<b>Keynote: Effective Policy Training: Leading Your Organization to Greater Success</b> Storm Wilkins - Temple University		
2:30 p.m. - 4:00 p.m.	<b>Keynote: Preparing Student Focus via the Manager</b> Carl Van - International Insurance Institute		

# CONCURRENT SESSION COURSE DESCRIPTIONS

## INSTRUCTIONAL DESIGN TRACK

### My Driveway Moments in Learning & Performance

*Sandra Colley, MBA, AINS, ITP - Nationwide*

**MONDAY, JUNE 15, 2020 | 10:00 A.M. - 11:15 A.M.**

A “driveway moment” is when you’re so captivated by something you are listening to (the term came from NPR) that you stay in your car to hear it to the end—even if you’re sitting in your own driveway. I have had these defining moments that have caused me to truly re-evaluate my prior beliefs or understanding of learning.

This session will be about sharing our driveway moments we have experienced as learning professionals and (hopefully) walking away with new perspectives and outlooks that may change the way previously viewed learning.

### Creating an Impactful LinkedIn Learning Profile & Social Media

*Heather Blevins, CPCU, AIC, AINS, AIS, SCLA - State Farm  
Chianti Tinsley - Primerica*

**MONDAY, JUNE 15, 2020 | 1:45 P.M. - 3:00 P.M.**

Have you ever wondered about the world of social media and what it means to your professional career today? Social networking and creating the right profile can be an integral part of your job search or career building—if you use it correctly! In this interactive session, learn how to create an impactful LinkedIn profile, and how to leverage the power of social media to boost your career aspirations through the ceiling!

### Building the Bridge: Moving Them From WOE to WOW!

*Linda Herodes, CIC - West Bend Mutual Insurance*

**TUESDAY, JUNE 16, 2020 | 10:30 A.M. - 11:45 A.M.**

Our industry is one desperate for new talent, but very few college students actively pursue degrees in risk and insurance. This is not a huge issue, because our industry also provides great onboarding programs to acclimate new hires to our business. The challenge for us becomes, then, not how much they know, but how we can best help them grow. Many new hires are straight out of college and are ‘pre-programmed’ to search for the right answer. How can we, as industry educators, build a safe bridge to help these employees focus on the rationale for the decision versus making the ‘right’ decision? As the next generation of insurance professionals, their opinions certainly have value. Even if their thoughts aren’t quite on the right track, at least we know what track they’re on!

## Microlearning

*Robyn Defelice, PhD - Revolve Solutions, LLC*

**WEDNESDAY, JUNE 17, 2020 | 10:00 A.M. - 11:15 A.M.**

Microlearning is a trending method for advancing performance, honing skills, and shaping talent throughout your organization. Like any other learning approach, it has its benefits for supporting your workforce, but also challenges when incorporating it into the organization’s learning framework. So is microlearning worth your organization’s investment? Let’s find out!

In this session you will gain an understanding of the strategic and operational factors that assist in leveraging microlearning as a performance support tool. Common considerations of time, talent, and resources will also be examined for how they impact the use of microlearning as part of the overall learning strategy. It sounds boring, but we are going to look at what makes adopting new learning approaches so darn hard!

Focus will be on highlighting these factors, not diving too deep. You will have an opportunity to apply the concepts to a case and also a chance to begin appraising your current capacity for creating learning products that focus on performance.

## LEARNING TECHNOLOGIES TRACK

### Culture Change as a Response to Increased Automation in the Workplace

*Guy Sellwood - Prosell Learning Ltd*

**MONDAY, JUNE 15, 2020 | 10:00 A.M. - 11:15 A.M.**

There are many theories about how advances in automation and particularly machine learning will alter the workplace, not least for customer facing roles. Research seems to agree that there will be increased need for emotional and social skills in the future workforce. McKinsey predicts that demand for social and emotional skills will rise 26% by 2030, across all industries.

What does this mean for the Learning and Development function? Developing social and emotional skills in an age when many workers are screen-bound may present interesting challenges. Technology itself will no-doubt can play a part, the use of VR to develop empathy is one such option. However, this session will focus on how a workplace culture that promotes coaching, feedback and interpersonal communication is instrumental for developing social growth. We will offer participants an opportunity to conduct a short ‘audit’ of their organization to assess the status of their coaching culture. Subsequently we will some of the obstacles that typically impede coaching interactions and how to overcome them.

Finally we will engage in some practical activities to hone our personal coaching skills and consider how they can be used to promote good practice in our organizations.

## CONCURRENT SESSION COURSE DESCRIPTIONS, CONTINUED

### Managing Copyright and Fair Use Issues in Training

*Arthur Carvajal, Esq., CDEI - WebCE*

**MONDAY, JUNE 15, 2020 | 1:45 P.M. - 3:00 P.M.**

The ability to present training content from a wide variety of sources can make our instruction engaging, exciting, compelling... and dangerous! Just because we are able to offer content from these sources, using them to strengthen our presentations and make our instruction more effective, does not mean we should do so. As the availability and ease of using others' content increases, so does the vigilance with which owners of intellectual property protect their rights to their content.

This 75-minute session will explore the elements of copyright, the rights that creators automatically obtain and those that copyright registration grants them, implications for the training professional, and the often-confusing nuances of the Fair Use doctrine. Exercises will include the practical application of the instruction to actual scenarios. The session will benefit the beginning trainer as well as the experienced trainer who wishes to strengthen knowledge about intellectual property. Learn how you can protect yourself and your company from claims of copyright infringement.

### Virtual Facilitation/ZOOM

*Sarah Braga – Nationwide*

*Maria Barnes, MBA - Nationwide*

**TUESDAY, JUNE 16, 2020 | 10:30 A.M. - 11:45 A.M.**

Virtual training is rapidly growing within many organizations. The days of delivering formal in-person learning is no longer the norm. As part of this concurrent session, we will share our story as well as tips and tricks for leveraging technology and converting training into a virtual experience. This will include changes in design and delivery methods, as well as how to obtain buy-in from business stakeholders and engage learners.

### Human-Centered Design

*Rick Menchaca - ExperiencePoint*

**WEDNESDAY, JUNE 17, 2020 | 10:00 A.M. - 11:15 A.M.**

Insurance and financial services providers of all types have recognized that human-centered design is an ideal methodology for providing better customer experiences; navigating changing customer needs, and out-innovating the many new competitive and disruptive forces in the industry. This session will provide an introduction to essential human-centered design techniques, mindsets and behaviors in a hands-on format that is itself innovative in its delivery. This 75-minute workshop highlights how to bring creative habits like deep user empathy, radical collaboration and rapid experimentation to one's work every day.

ExperienceInnovation™ | Aware is the workshop technology we will use, which enables people to develop an awareness of and support for human-centered design as an approach to problem solving. Our workshop will also help people provoke fresh ideas to address a meaningful challenge or opportunity that they themselves define.

## PROFESSIONAL DEVELOPMENT TRACK

### How to Build a Powerful Personal Brand: Think Bigger and Optimize Your Networking Skills

*Larry Nicholson, MBA, MS-RMI - Gulfstream Property & Casualty Insurance Co.*

*Abi Potter Clough, MBA, CPCU - AbiLeads*

**MONDAY, JUNE 15, 2020 | 10:00 A.M. - 11:15 A.M.**

Building your personal brand plays an essential role in your professional success and growth. The root of all successful insurance trainers and speakers start with a powerful personal brand. As insurance trainers our brand and reputation is of the utmost importance to establishing credibility with our audiences to maximize the overall effectiveness of your training delivery. This course will provide modern and game-changing techniques to bolstering your personal brand and self-confidence while growing your professional network and relationships with your training audiences.

After this course you will be able to:

- Understand why personal branding is essential for insurance trainers and leaders
- Identify methods to grow your network and identify your passions
- Implement strategies for new-age content creation and delivery of your insurance training courses
- Develop tactics to create and grow your brand as a subject matter expert in your field
- Network successfully both in-person and virtually

### Insurance Elevator Pitch

*Mary Bruggeman, MBA, CPCU, AIC-M, AU, AIM, AIS, AMIM, ARM-P, ARe, ASLI, ITP - Great American Insurance Group*

**MONDAY, JUNE 15, 2020 | 1:45 P.M. - 3:00 P.M.**

Have you ever found yourself on an elevator with a C Suite officer of your organization who asks, "What's new?" What about having to "sell" the insurance industry to a 20-year-old college student applying for their first job. This session is designed to be both interactive and informative and help attendees learn the skill of impromptu speaking and the art of the Elevator Pitch. Elevator Pitches are concise, compelling, and can be multi-purpose. Trainers can start an Instructor Led Training or Webinar with a compelling 60 seconds on why attendees will be glad they attended! They are created through a process and stand ready in your back pocket to help you be engaging and persuasive on the spot!

# CONCURRENT SESSION COURSE DESCRIPTIONS, CONTINUED

## Coaching Techniques for Trainers

*Lawanda Hall - Intelligent Intentions, LLC*

**TUESDAY, JUNE 16, 2020 | 10:30 A.M. - 11:45 A.M.**

Give your training sessions a boost by incorporating effective coaching techniques. Training is not just about providing facts and figures, but also empowerment and inspiration. While it is important to provide the proper vocabulary and basic information; incorporating effective coaching enhances performance and propels pupils to higher heights. This high energy session will give you guidance on the benefits of inviting interest, invoking self awareness, encouraging responsible engagement and igniting confidence in students.

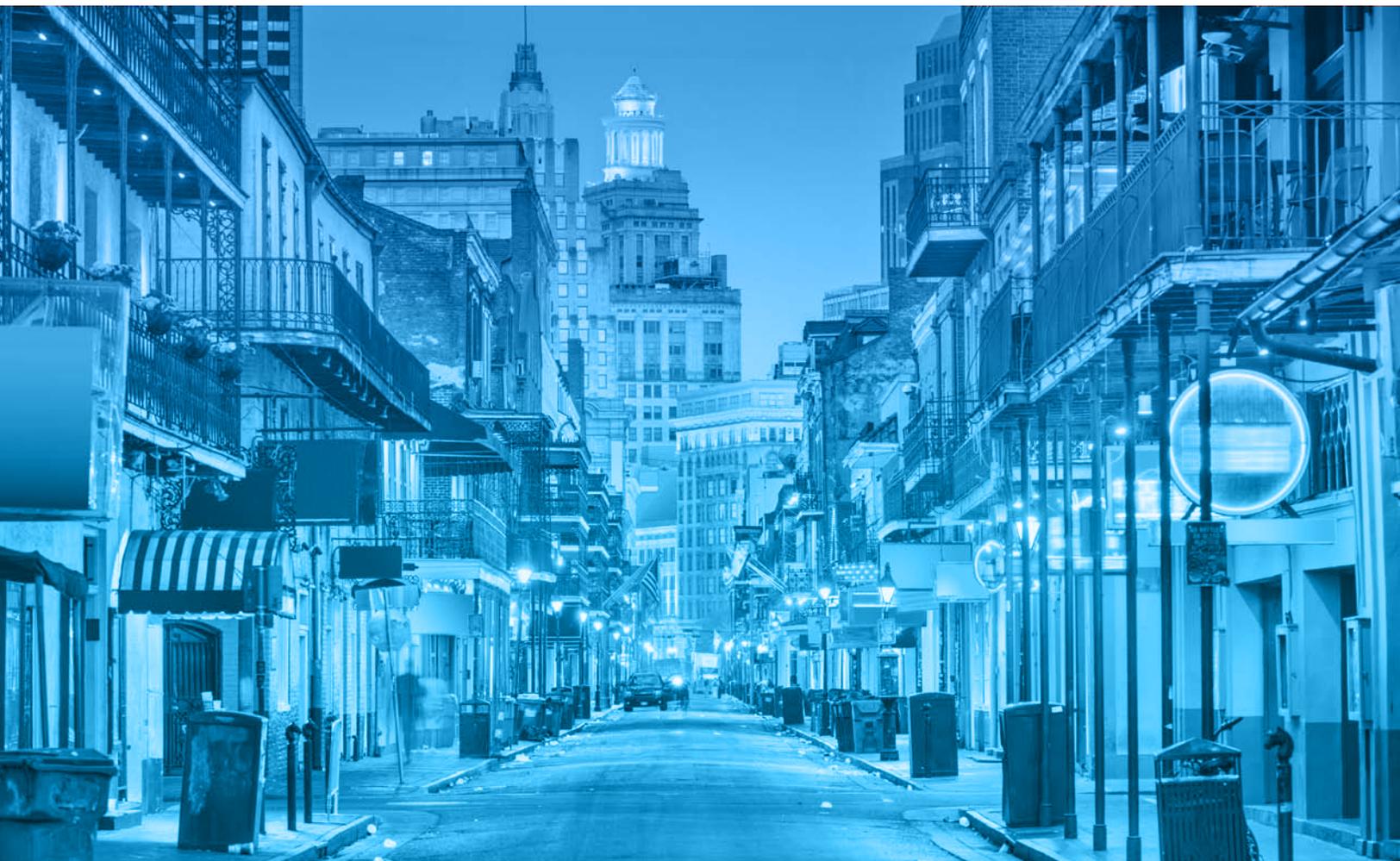
## From Idea to Implementation: Developing a Plan for Training & Education

*Lynda Carter - Competitive Edge Consulting, Inc.*

**WEDNESDAY, JUNE 17, 2020 | 10:00 A.M. - 11:15 A.M.**

You have an idea, or you're assigned a problem to solve, and your being asked: how long will it take? what will it cost? Maybe you follow the ADDIE model (Analyze, Design, Develop, Implement and Evaluate) and you are looking for more planning tools in your tool kit. This session focus on key project management skills for training and education professionals. You will learn proven, successful techniques for detailed, systematic, team-involved planning that will help you answer:

- How is implementation, evaluation and learning success defined?
- How do I engage stakeholders?
- What is scope anyway, and how can scope creep be managed?
- Communication is complex –how do I get the right information to the right people at the right time?
- Every project has risks. What are the common risks in a training and education project? How do you identify and manage these risks?
- How long will it take? and What will it cost?



# TRAIN THE TRAINER

**SATURDAY, JUNE 13 & SUNDAY, JUNE 14**

**8:00 A.M. - 5:00 P.M. SATURDAY | 8:00 A.M. - 12:00 P.M. SUNDAY**

## WHY TRAIN THE TRAINER?

**A**re 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 six-week 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 ½ 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.

## PRICES:

**MEMBER FEE:** \$900 (plus travel expenses to live session)

**NON-MEMBER FEE:** \$1,275\* (plus travel expenses to live session)

\*Registration Fee includes one (1) year of SITE Membership, effective registration date.

**REGISTERED TRAIN THE TRAINER PARTICIPANTS RECEIVE A \$100 DISCOUNT ON THEIR REGISTRATION FEE TO ATTEND THE SITE ANNUAL CONFERENCE. CALL OUR OFFICE TODAY TO LEARN MORE!**



# HOTEL INFORMATION

## JW MARRIOTT NEW ORLEANS

641 CANAL STREET

NEW ORLEANS, LA 70130

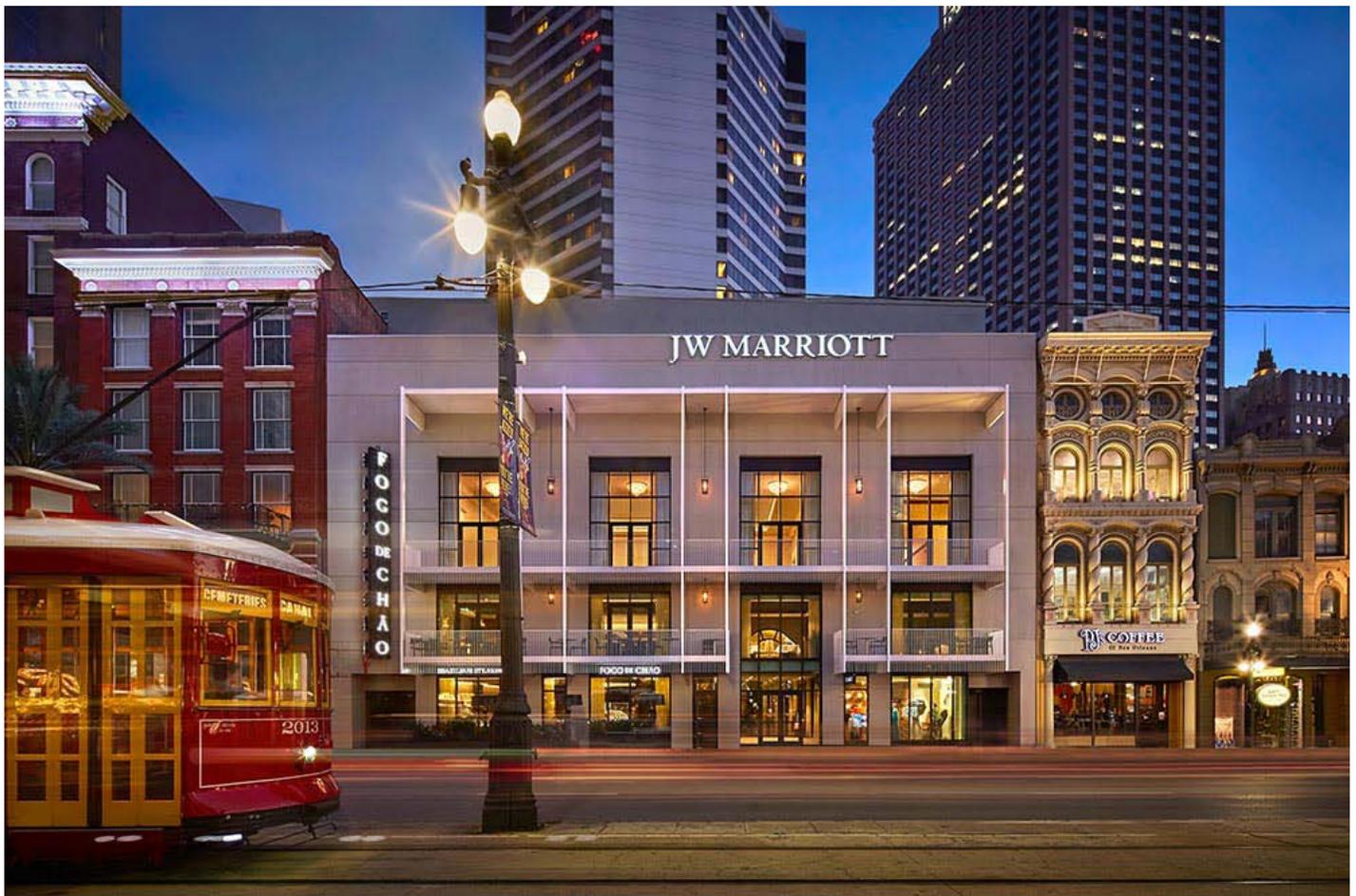
**S**ITE has secured a special reduced rate of \$179 per night for SITE attendees (Standard Guest Room). All rooms are subject to hotel service fees and taxes. Make your hotel reservations directly with JW Marriott by visiting [www.insurancetrainers.org/hotel-information](http://www.insurancetrainers.org/hotel-information). Use the link provided to gain access to our private event access site. Reservations must be made by Friday, May 22nd, 2020 to receive this special reduced rate.

*Credit: JW Marriott New Orleans*

## RESERVE YOUR ROOM TODAY!

Immersed in the world-famous French Quarter, the JW Marriott New Orleans is just moments away from Jackson Square and the French Market. Discover the unique culture of NOLA from our ideally located hotel. Dance your way through Bourbon Street, or rediscover history at the National WWII Museum. After exploring the city ensure a restful night's sleep in the Big Easy. Our impeccably appointed rooms and suites boast luxury bedding, marble bathrooms and ergonomic workspaces. Keep your workout routine at our fitness center or take a refreshing swim in our saltwater pool while enjoying fantastic city views.

*SITE can only reserve a certain number rooms at the discounted rate. Once the room block is sold out, even if that day is prior to the cutoff date, a higher prevailing room rate will apply.*



# REGISTRATION INFORMATION

Annual Conference Registration Type	Conference Option	Registration Price	
		Jan 1, 2020 - April 30, 2020	May 1, 2020 - Onsite
SITE Member Attendee	Full Conference	\$995	\$1,095
	One Day Only	\$500	\$500
Nonmember Attendee	Full Conference	\$1,195	\$1,295
	One Day Only	\$600	\$600

Registrations are currently only available online at [www.insurancetrainers.org](http://www.insurancetrainers.org).

Click on the Register Today! on the homepage. Use your MasterCard, Visa or AMEX. If you need assistance, please call our office at (850) 205 - 5634.

**Refund policy:** Written notification is required for all refunds. Refund requests received by April 30, 2020 will receive a full refund. Refund requests made on or after May 1, 2020 will receive a 50% refund.

**ADA:** If you have special needs that require accommodations, please notify SITE in writing no later than May 10, 2020 at [office@insurancetrainers.org](mailto:office@insurancetrainers.org).

**Annual Conference Dress Code:** The dress code for the 2020 Annual Conference courses is business casual (no t-shirts, tank tops or flip flops please).

**Questions?** For more information, contact SITE's office by phone at (850) 205 - 5634 or e-mail at [office@insurancetrainers.org](mailto:office@insurancetrainers.org).



Society of Insurance Trainers & Educators (SITE)  
 325 John Knox Rd, Ste #L103  
 Tallahassee, FL 32303  
 Phone: (850) 205 - 5634  
 Fax: (850) 222-3019  
 Email: [office@insurancetrainers.org](mailto:office@insurancetrainers.org)

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