

# InSITE



## WINTER NEWSLETTER

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## PRESIDENT'S MESSAGE

MESSAGE HERE

Larry Nicholson, MBA, MS-RMI  
SITE President

Dear SITE Members, Guests and Friends,

I hope this message finds you and your loved ones safe and healthy. The unprecedented impacts of the COVID-19 pandemic continue to impact our lives both personally and professionally. As Insurance Trainers, all of us have had to adapt to the necessities of staying healthy, caring for loved ones, and navigating the complexities and opportunities of training in a fully virtual environment.

Furthermore, we are Trainers in an industry that insures the risk of people and businesses not only from the risk of a pandemic, but also from hurricanes, wildfires, cyber-attacks, theft/vandalism, business interruption, all of which have occurred in much frequency during the year of 2020. The SITE Board of Directors are extremely proud of the resilience and flexibility that you have endured for your training programs to serve the needs of the insurance industry. In my view, training is a core function and necessity of the industry and is needed more today than ever before.

The SITE Board met (virtually) in October 2020 for a strategic planning meeting and welcomed our newest board members, Meg McKeen, Nick Hart and Ron Trifari. During the strategic planning session, the SITE Board focused and reflected on the various opportunities and improvements you have shared with us over the course of this year. Therefore, for 2021 we are gearing up now and are excited to launch new virtual program offerings; (1) virtual annual conference, (2) virtual Train-the-Trainer course, (3) virtual community for member collaboration and networking through the SITE member portal on our website.

As a niche Non-Profit and Member-Led organization, I am thrilled to report that SITE remains financially solvent and fully operational during the COVID-19 pandemic. I want to thank our Board of Directors for making the prudent but challenging decisions throughout this unprecedented year so that SITE continues to grow and thrive. This achievement would not be possible without all SITE members, volunteers, supporters, and sponsors.

On behalf of the entire SITE Board of Directors, we thank you all for your ongoing commitment and dedication to SITE. As always, please feel free to contact me or any member of our Board if you have suggestions, feedback or just to brainstorm new ideas. We look forward to speaking with you in the near future

Happy Holidays!

Sincerely,

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

Larry Nicholson, MBA, MS-RMI  
SITE President

# SITE News

## Welcome New Members!

**Gold Coast Schools**  
Amy Wavrunek

**Highmark, Inc.**  
Colleen Behnke

**New Mexico Mutual**  
Jerry Tyler

**Organization**  
Elizabeth Carter

**Pure**  
Emily Lewis

**Sentry**  
Elvin S Taylor Jr.  
Emily Standifer  
Hope Gay

**Sentry (con't)**  
Jennifer Demiter  
Medus Phaedra  
Lawrence Pistell  
Pamela Nitzke

**Taylor Financial and Insurance Institute**  
Rachel Beard

**Peter Tobin College of Business**  
Susan Carey

**West Ben Mutual**  
Zak Bleser

Susan Carey

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## SITE Calls YOU to Host a Webinar

Have you ever thought about stretching yourself and hosting your own insurance webinar? SITE hosts a free educational webinar monthly for members and we are looking for engaging presenters - and topics - that will educate and inspire our community in the upcoming year. Our members need to hear from you and the experiences you have navigating the exciting world of insurance training.

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! **Interested? to learn more, message Meg McKeen at <https://www.adjunctadvisors.com/site> or [meg@adjunctadvisors.com](mailto:meg@adjunctadvisors.com).**



## SITE Member Spotlight

SITE would like to introduce you to one of our members!

### Traci Adedeji CPCU, CSPO, ARM, API, AIDA - Automobile Insurance Plans Service Office (AIPSO)

Traci is the Insurance Operations Program Lead for AIPSO in Johnston, RI with over 30 years' experience in Personal Lines underwriting.

Traci's insurance career began in 1984 as a file clerk at a small insurance agency in New Jersey. She went on to hold underwriting positions with national companies like Chubb and AIG. In addition to front-line underwriting, her experience includes a diverse array of responsibilities including managing people, training and development and roles in project management. In Traci's current role as Program Lead at AIPSO, she oversees the day-to-day operations of the residual market automobile plans for 16 states. She also serves as Product Owner, collaborating with AIPSO's project management office to develop a new policy administration system, and helping to drive the organization's Agile transformation.

In the two years since Traci joined AIPSO, the organization's business needs have evolved, creating a steeper learning curve for employees as they take on new responsibilities. AIPSO created a Trainer Network to provide learning and development resources to the organization. Traci is a part of that network and is leveraging her experience with creating and delivering technical training programs to prepare for training on the new policy administration system currently in development at AIPSO.

Traci is known for her down-to-earth, relatable style of training that is always sprinkled with a bit of her unique sense of humor. The key to her training programs is flexibility and customization. She finds that technical training works best when it is scenario-driven instead of just conceptual. This allows users to understand how the functionality being trained applies to and benefits their job. She also finds that incorporating hands-on practice for participants helps with user adoption and with development of new mental muscle memory. Traci joined SITE in 2019 to take advantage of the robust training opportunities offered and to broaden her network of training resources.

Traci lives in Pawtucket, Rhode Island and is a single empty-nester who certainly keeps busy when she is not making insurance magic happen. She is the 2020 President-Elect of the CPCU Society - Rhode Island Chapter, an instructor for CPCU 530: Navigating the Legal Landscape of Insurance, and recently resumed studies online at Franklin University to complete a bachelor's degree in Risk Management and Insurance. In her free time, she enjoys cooking, reading and shopping.



**ABI POTTER CLOUGH, MBA, CPCU**

AbiLeads

CEO

## Crazy Confident

### Grow Your Public Speaking Ability to Insane Levels

Much has been said about how to improve public speaking skills and feel more confident speaking in front of an audience, whether it is in a training session, presentation, or formal event. You may have even tried some of the oft-recommended ideas, like joining Toastmasters or imagining the audience in a state of undress. Let's talk about some unconventional ways you might improve your public speaking chops and gain insane confidence in yourself!

Here are five new ways you can develop confidence in your public speaking and presentation skills:

#### Use music!

Is there a song that inspires you, makes you want to dance, or makes you feel something? Use that emotion and energy to help you in your next presentation, training class, or other event. A special song can become your anthem or mantra; something to listen to daily or to pump yourself up before an event. For me, "Girl on Fire" by Alicia Keys never fails to inspire me, and "Billionaire" by Travie McCoy gets me going like nothing else - the chorus starts with "Every time I close my eyes, I see my name in shining lights" (McCoy, 2010). You may decide to play your song every morning to pump up your day or save it for just before special events. Heck, it could even become your enter music to play when you come on stage (and see your name in lights)!

#### Find inspiration in physical movement

Try some light exercise before you are going to be on stage, perhaps a little yoga, core work, light stretches, or a walk. This has a few benefits: the increased blood flow from the movement will help you think better, it may give you a little rosy glow to your cheeks before stepping onto the Zoom stage, and it will improve your confidence in yourself. When you feel better, you do better, so enjoy a little endorphin hit and enhance your thoughts at the same time.

#### Listen to lyricists and study speech patterns

I listen to how various lyrical artists use phrasing, pauses in their delivery, and emphasis on words to help me develop better public speaking skills. I love to listen to Eminem and the way he uses tone, words, and rhythm to learn how to better control my own pacing. Have you ever listened to someone give a very monotonous speech? It tends to blur together, where someone who breaks up their speech patterns and uses tonality, pitch, and pauses to excite the listener can share their message in a more interesting way. You could also study news anchors, politicians, and actors to continue increasing your abilities. Watch where they place emphasis and how they use facial expressions and gestures to make their point.

#### Read aloud your prepared speech

Try this technique to hear the phrasing as your audience will. Well-timed pauses and shifts in speed and tone will grab attention. A popular writing tip is to vary the length of your sentences in order to engage the reader. This works with the spoken word, as well. Shorter phrases interspersed with longer, more complex sentences

keep the audience listening. Too much may create an annoying singsong cadence and by reading your speech out loud it will help you find a naturally engaging and pleasing rhythm.

### Use an alter ego.

You have heard the clichéd expression 'Fake it until you make it', which has stood the test of time for good reason. If you are playing a role, pretending to be someone else, it can give you insane confidence on stage! Authors throughout history have used pen names, artists choose anonymity, and actors and singers use stage names. Even established artists use alter egos to change up their look or sound. Beyonce used Sasha Fierce, Garth Brooks was Chris Gaines. One thing I have always done is use a fake name when traveling for things like Starbucks or Jamba Juice, places they call your name with your order. It was a little bit of fun for me when I was flying every week and helped me feel safer traveling alone in new cities and airports. I still rely on my alter ego and she is tough, bold, and brave when I do not feel like being those things. It has helped me get past the nerves by acting like someone who is not nervous.

Try one of these ideas and let me know how it works for you!

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



MEG MCKEEN

Adjunct Advisors LLC

Founder &amp; CEO

## The Juxtaposition of Training

Walking home after running a quick errand, I smiled as I took this picture.



Lovely, isn't it?

I've walked by this tree countless times this past year and not paid it any attention - it's not the most remarkable tree after all.

But today, these sweet red berries stopped me in my tracks.

My smile, though, isn't because of the beauty of nature.

No, it's because not 20 feet away, a jackhammer is currently firing as part of an ongoing road construction project.

Sweet and simple. Loud and disruptive.

Quite a juxtaposition.

It's so curious to me how different our experience can be when we engage more than one of our senses - or another sense altogether.

This week, I opted not to make a pot of chili for dinner in favor of something a little less....fragrant.

As my home here in Chicago is currently up for sale, potential buyers want to smell homemade chocolate chip cookies - not garlic and onions, right?

And in the novel I'm currently reading, the author shares that the room where the suspect is being questioned is so cold she shivers.

Discomfort - in a most fundamental way, right?

And that dull ache in my lower back? After 7 months, I'm ready to admit that the kitchen chair I've been sitting on at my makeshift desk just won't do anymore.

As professional trainers navigating this virtual environment, we focus our energy in large part on the visual experience of our audience.

We perfect our slides, we time the captions on our videos just right, and our handout is formatted to perfection.

But as Zoom fatigue is now a thing - it is totally a thing, right? - let's shift our focus to the other four senses.

Can that exercise be completed with the camera turned off?  
Can we queue up a favorite song and play it for the group?  
Can the presentation be paused for a five-minute walk-around-your-space break?  
What's in your cup? Have you asked your audience what's in theirs?

After all, when we bring awareness to each of our senses, we engage more fully, deepening the connection we make with those we hope to reach.

*Celebrating her 21st year in the industry, Meg McKeen, CIC, founded Adjunct Advisors LLC in 2018 with the essential belief that the way we sell insurance is ripe for change. Throughout her career, working both as underwriter and agent within the insurance industry, Meg has held a seat at the table during thousands of insurance negotiations. Meg now holds space, at the crossroads of personal and professional development, for individuals and groups of insurance salespeople as they grow in their sales practice through 1:1 and small group coaching, in-person and virtual facilitated workshops, and the podcast she hosts, Bound & Determined. A graduate of Illinois Wesleyan University and resident of Chicago's Lakeview neighborhood, when she's not helping business professionals, you can find Meg putting the "practice" into yoga practice, searching for the best vegan burger, or enjoying live music and the wonder that is Chicago's lakefront. Learn more at [www.adjunctadvisors.com](http://www.adjunctadvisors.com).*



## CHELSEA WATERS

Selective Insurance

Claims Learning Management Specialist

## Virtual Training - “The New Normal”

The world has changed drastically following the COVID-19 pandemic. We have stopped shaking hands, we wear masks in public and many people no longer commute to work. For those in the training industry, this presents some unique and challenging circumstances. How do we create engaging and valuable training without the ability to be in-person or in the classroom? When preparing for your next virtual session, consider these options to engage your learners and improve your success.

### Set Expectations

Prior to the session, make attendees aware of what will be expected of them and what they can expect from the session. Provide an agenda or overview of the session so learners have a clear understanding of what they will gain from the session. Let attendees know that they will be called on to answer questions, share experiences and provide feedback. Ask attendees to join with their video on if they are comfortable doing so. By setting the expectation that the session will be interactive and not simply a presentation, attendees will show up ready to be actively involved.

### Recreate Pre-Work

Have you ever registered for a training session only to receive an email with instructions on how to complete the thing that everyone dreads... pre-work? Pre-work provides attendees the opportunity to become familiar with content, terminology and ideas before the session; however, the idea of having to work *before* you even get to the session is frustrating to many. Instead of assigning *pre-work* for your session, consider sending a *pre-session activity* that is fun and challenging for learners. For larger groups, assign small group exercises to not only introduce content but also get participants engaged with one another.

### Create a Shared Space

Creating interaction in a virtual environment can be extremely difficult. Utilize your platform's features to allow participants to play an active role in the session. For instance, share a graph or a list of items and ask participants to use the annotation tool to circle the option they believe is correct. If your platform allows, create small group breakout rooms for collaborative conversation and brainstorming. As the facilitator, pop in and out of the groups, listen to feedback and share meaningful highlights with the larger group.

### Take Unrelated Breaks

Break up your session and give everyone's brain a rest by building in time unrelated to the session topic. Get creative and come up with ways for learners to give their eyes and brains a break from the content being presented and stretch their mental muscles. Consider building in a fun brainteaser or critical-thinking exercises. If you really want to get your audience moving, send them on an in-home scavenger hunt - identify one item and give them 15 seconds to go find that item in their home and share it with the group. Breaks don't have to be all coffee and checking emails.

Virtual training does not have to be boring or repetitive - get creative and think outside the box. Your learners will have a more meaningful experience and you will have more fun teaching them!

*Chelsea joined Selective Insurance Company of America in 2015 as a workers' compensation adjuster and began her role as a Claims Learning Management Specialist in May 2018. Prior to Selective, she worked as an*

*adjuster and case manager for a personal injury attorney in Charlotte, NC. Currently, she works closely with the workers' compensation department onboarding experienced adjusters and running the workers' compensation trainee program. She joined SITE after transitioning into her current role seeking professional development and guidance from a training perspective. After completing SITE's Train the Trainer program in October 2018 and writing an article featured in the InSITE Fall 2018 Newsletter, she is excited to continue pursuing opportunities within the SITE organization. Living just outside of Charlotte, Chelsea, her husband (Maron) and 7-month-old (Noah) love to spend time outdoors. Combining her passion for writing with her love of nature, she has published articles in several hunting magazines and online publications. In her spare time, she enjoys playing with her two dogs (Charlie & Mason), getting involved in her church and spending time with her family.*



HEATHER BLEVINS, CPCU, M.ED,  
SCLA, AIC, AIS, AINS

State Farm

Organizational Change Analyst

## Courage to Rebound

*So often in life, things you consider an impediment, turn out to be great good fortune. – Ruth Bader Ginsburg*

We have all gotten adjusted to brand new vocabulary words and phrases this year. These words permeate our conversations and inundate our existence because they are the flavor of this wild and chaotic year. We hear these words on television, on our social media feeds, and we use them almost daily in our conversations. Who would have thought at this time last year these words would become such a part of our daily lives and what impact just a few simple words would have?

- Social Distancing
- Wear Your Mask
- Flatten the curve
- Quarantine
- Coronavirus
- Virtual Meetings & Learning
- Unprecedented
- New Normal

This certainly has been a year of challenges. A year of abnormality. A year where we all had to learn how to operate much differently, outside of what all of us would call our “comfort zones.” This year has pushed each of us to think about our mortality, to change priorities, to focus on a new way of living and interacting with others. But all the stressors and trials of 2020 can do one of two things to us, and only if we allow them power. The power to hold us back or to push us forward.

I must admit, I’ve personally experienced moments in this year which have caused me to really pause and wonder, “What am I doing with my life?” I have lost friends to COVID, seen friends battle this evil disease and win, and been starved of the in-person interactions I crave. I’ve desperately missed traveling and communing with “my insurance people.” I’ve missed going to restaurants, shopping in stores, and spending time with others laughing and enjoying the uniquely human experience. Pretty sure I am not alone in those feelings. I am naturally an extroverted person and spending so much time “quarantined” in isolation has been difficult. I have not always responded to the lack of interactions with the best of attitudes and have found myself increasingly reflective on what kind of person I am and the mark I want to leave on this planet. When you lose people you know, even if you aren’t really close to them, it does make you increasingly focused on your own mortality. There was a moment in the past few months where I found the courage to rebound from the tough and often dark places, I found myself several times this year, and started looking forward.

I cannot say there was some shocking revelations which came out of that moment. I do not have the wisdom or knowledge of Socrates, nor did I find some special form of inner peace by making this choice. What I did decide was that I was going to dig deep and find a brave light inside of myself. In truth, I found my grit this year. The grit to bear the unknown. The nerve to face whatever mountain or valley may come next. Grit does not mean that I won’t face challenges and difficulties. It just means I have the will and strength to gut through whatever comes my way.

And I have decided to change the phrases I use to describe this year, because when you reflect on all that has happened, so many glorious and wonderful blessings have come from this extraordinary year.

I will look on this year as a moment in time where I learned:

- To be more respectful of others
- To protect and care for the safety of society
- The power of resilience
- How to build knowledge in creative ways
- The exhilaration of climbing difficult mountains
- Connection with others in new and different ways
- To celebrate the joy in simple things
- To never stop working at the “next big thing”
- Truly how to craft the life I want to live

I would encourage everyone to dig deep and find the courage to rebound from this event which will soon be just a quiet mark in the history books. Find it within yourself to be present within the hard moments, and to grow through them, despite how uncomfortable they may be. Push through the barriers and impediments that may hold you back from looking towards a brighter future ahead. Rebound with courage.

*I asked life “Why are you never easy?” Life smiled and said, “You people never appreciate easy things.”*

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

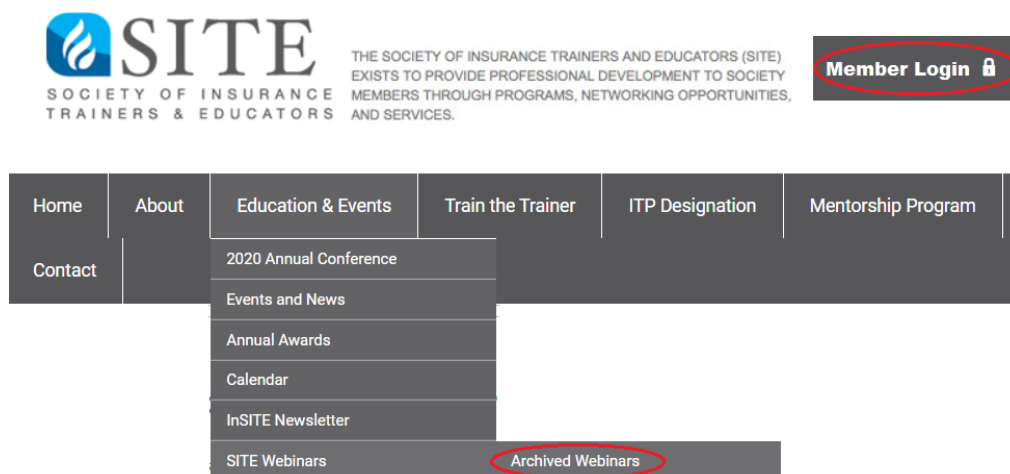
## Archived Webinars

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

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

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

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



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## Podcasts

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

## Upcoming Events

### Interactive Virtual Roundtables

Based on feedback from members on a desire to continue to connect and learn more about virtual communication options SITE created the Interactive Virtual Roundtable series. We have an incredibly special IVR planned for **December**.

**"2020 Ain't Over Yet"**

**Wear Your Favorite Ugly Sweater & Slippers are Mandatory**

Join us for this FUN and ENGAGING SITE Interactive Virtual Roundtable at **2pm Eastern time DEC 4**



Have some holiday fun with your fellow SITE Members, sip some nog, and laugh our way out of 2020.

**PRIZE for the UGLIEST SWEATER to be given away!**

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

### Webinars

#### Virtual Training

Are you struggling making the transition from live in person training to online classrooms? Join veteran SITE member Frank Hays as he shares the challenges and his lessons learned in mastering engagement in the virtual classroom. You will come away with ideas making it easier for you to master interactivities in the virtual environment.

**DECEMBER 18TH, 11 Eastern time**



Access links for events are available [HERE](#).



## 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)

## Board of Directors 2020 - 2021



### **President**

**Larry Nicholson, MBA, MS-RMI**  
Vice President of Underwriting  
Gulfstream Property & Casualty  
Insurance  
813-892-3779



### **Immediate Past President**

**Sandra Colley, MBA, AINS, ITP**  
Learning & Performance Training  
Manager  
Nationwide  
608-397-2870



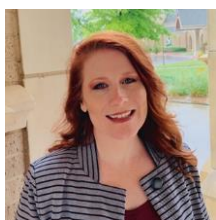
### **VP Annual Conference**

**Maria Barnes, MBA**  
Learning and Performance Manager  
Nationwide  
614-880-5877



### **Director of Conference**

**Nick Hart**  
Development Specialist  
Payne West



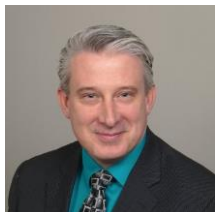
### **VP Marketing**

**Heather Blevins, CPCU, AIC, AINS, AIS, SCLA**  
Change Management Analyst  
State Farm Insurance  
918-693-9667



### **Director of Communication**

**Chianti Tinsley**  
Training Designer, AVP  
Primerica  
470-564-6647



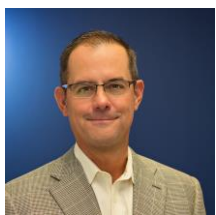
### **VP Programs**

**Patrick Wraight, CIC, CRM, CISR, AU, AINS**  
Director  
Insurance Journal Academy  
619-584-1100 ext. 130



### **VP Member Services**

**Kenneth Thakur, CIC**  
Education Consultant  
Allstate Insurance Company



### **Secretary/Treasurer**

**Steve Cline, CPCU, CIC, ITP**  
Training & Business Development  
Consultant  
Zurich  
913-339-1246



### **Director of Programs**

**Meg McKeen**  
Founder  
Adjunct Advisors



### **Member-at-Large**

**Bill Raab, MSM-RMI, CPCU, ARM**  
Program Director  
Risk Management and Insurance –  
University of Baltimore  
914-592-5824



### **Member-at-Large**

**Arthur Carvajal, Esq., CDEI**  
Executive Editor and General Counsel  
WebCE, Inc.  
972-616-1149



### **Director of Benefits**

**Ron Trifari, MBA**  
Training Consultant  
Nationwide

