InSITE

SITE Society of Insurance Trainers & Educators

Winter 2017

President's Message

Sandra Colley, SITE President

sitepresident@insurancetrainers.org

The leaves are falling and changing colors here in Columbus, Ohio.

Fall in Ohio is my favorite time of year with beautiful scenery, crisp weather, and of course the start of boot wearing season!

As we near the end of 2017, it is a time for reflecting on what we have accomplished this year, as well as what we are thankful for.

SITE has accomplished so much this year, including:

- Formalized an exclusive Train-the-Trainer
- New xSITE speaking format for our 2018 conference (think Ted Talks)
- Increased social media presence
- New Google Business page
- Improved website
- Trademarking SITE's name
- Creating a new member video
- Forming partnerships with other associations
- Three-year strategy
- Plus, much more…

In addition to these amazing accomplishments there are many things that I am personally thankful for:

- An engaged and caring Board of Directors
- Our members' contributing by writing articles and chairing committees
- The lasting friendships I have forged
- The mentors who have helped guide my career
- The professional development opportunities that SITE offers (ITP, TTT, webinars, etc.)
- The opportunity to benchmark and learn from other learning & performance professionals
- Professionals who understand exactly what I do!

In the past, members have referred to SITE as the "best kept secret". That needs to change! This amazing organization should NOT be kept a secret. I'd recommend each of you take a minute (or two) and reflect on your year and where you want to go in 2018.

In This Issue:

Being selfish, I hope part of your 2018 includes SITE and helping us not be the "best kept secret" anymore. Instead, let us solidify ourselves as the best organization for the insurance learning professional.

Cheers everyone to a great end of the year. I am thankful for each and every one of you!

Six Simple Questions for Setting Up Your Learning Management System

Kimberly Levitt, CPCU, IC, Sr. Learning Management Specialist

Selective Insurance Co. of America

We have a new LMS! Exciting or intimidating?? As one of the administrators for the LMS, I can readily testify that a new LMS is both exciting and intimidating. Exciting because we now have the power to control the user experience for our particular audience. Intimidating because no one in our department was 'fluent' in LMS verbiage when we started this adventure.

Months of planning and preparation are leading up to an official 'launch' of the site. We use this LMS strictly for insurance related education that a user may need in order to effectively do their job. Our audience is primarily claims, underwriting and safety management. Traditionally, the user would only stumble into the LMS if they had courses assigned. Going forward, it is our plan to have the user to check here first. Sound simple? Not initially.

Questions we had to keep in mind while transitioning to this new LMS:

Who is using the LMS? Our entire company has access, after all, we want everyone in the company to have the ability to learn more about the industry, but we stand firm on content being insurance related education**.** You will not find Microsoft Office training.

How will they access? We set up a single sign on but also allow the ability to set a password if working from a remote device – be it a home computer, tablet, or cell phone. Let's face it, with a large staff of remote employees, and a trend toward short, need it now training, employees need the ability to access without being officially connected to the network.

Will existing content be compatible? Best practices for publishing require either a review or deactivation date for all courses. We ran into compatibility issues on some older modules which necessitated a review of all courses over a fairly short time frame. Unfortunately, this has led to deactivation of a few modules that were still technically accurate.

How do we integrate with third parties? Thankfully, all of our external educational providers are able to connect to our LMS for seamless integration for our users. Future plans involve adding WebEx functionality so that our users will be able to see at a glance all of their upcoming training sessions.

How can we leverage the LMS for trainees? New to the industry employees need to be brought up to speed quickly with much of the learning completed 'on demand' as opposed to a set of scheduled classroom sessions. A fantastic feature of the new LMS is the ability to create a curriculum. This curriculum can be as simple or complex as desired.

What should the LMS look like? Our team previewed samples of other company sites and experienced different looks within our own site before landing on a streamlined welcome page applicable to most users. Managers have a slightly different view which allows them to track their employees' training. Future plans involve custom pages based on job role or position within the company.

And so here we are, ready to 'launch' a new user experience. Intimidation has been left behind, and we are all excited to see the fruit of our labor.

Systems, Process and Procedure Training Instructional Design Using Quick Reference Guides

Richard Hart, Director of Sales Training, Georgia Farm Bureau Insurance

Ever been to a training class and the topic has been something technical or process driven? You're sitting in the back watching the instructor go through screen flows or PowerPoint slides and you're staring at a printout of the instructor's presentation. For many this is pure learning hell, especially if the training is not interactive.

I have experienced this in training for a new automation system which, given the scope and timing of the project, required phased training over several months. Users who did not get to use the learned skills immediately often forgot most (if not all) of the material covered in class.

When designing training for systems, automation, or workflow processes, one of the challenges often faced is learner retention of the topics being trained. Unfortunately, systems and process training is just downright boring for many folks (me too). Research by the National Training Laboratory resulted in some troublesome statistics related to learning retention. According to the National Training Laboratories retention rates are:

- 5% for lecture based training
- 10% for reading based training
- 20% for audiovisual training
- 30% for demonstration based training
- 50% for discussion based training
- 75% for practice –hands-on training
- 90% through teaching others

As this research shows, systems, processes, and automation training is best performed "hands-on". But what if you cannot perform training in this manner? What if there are too many people to train or the topic being trained does not lend itself to hands on training? This is where Quick Reference Guides can become a critical component in Instructional Design.

What is a Quick Reference Guide? It's a tool that a learner can keep after training is over that contains just enough of the right information to complete a task or get a job done. Some characteristics of a good too Quick Reference Guide are:

Brief –good Quick Reference Guides are not encyclopedias, they are not exhaustive references.

Visual –good Quick Reference Guides appeal to visual learners and graphically demonstrate or illustrate a limited number of topics.

Basic –good Quick Reference Guides provide basic information written at a low level of complexity.

Limited –good Quick Reference Guides limited their scope to a single topic or idea. If additional instruction is required for other topics, additional quick reference guides can be used.

Somewhat easy to develop – a good Quick Reference Guide should easily flow from the material you have already developed to train on the topic. Often you do not need additional research to develop the Quick Reference Guide. It can be no more than some bullet points from the larger instruction, or some screenshots to visually show how to enter data properly.

Some of the benefits of Quick Reference Guides are:

Portability –Quick Reference Guides can go away with the learner when they leave training

Consistency –Quick Reference Guides can serve as a documentation that all use and thus perform tasks in a similar manner

Visualization – Quick Reference Guides can include pictures and diagrams that make understanding difficult processes, procedures, and screen inputs easier

Some challenges in developing quick reference guides are

Over-documentation – Quick reference documents that are too large or cumbersome fall into the lowest retention category - reading.

Understanding your audience – often quick reference documents can be developed by subject matter experts whose understanding of concepts and vocabulary is significantly greater than that of the audience. This can be confusing unless it is edited for the audience.

Brevity –it's hard to write a short training document. As a 16th century author once wrote "I only made this letter longer because I had not the leisure to make it shorter". It actually takes more time to write less.

(Continued on page 9)

Are You And Your Company Innovative?

SITE is calling for applicants for the

Lois A. Markovich Innovation Award for 2018

Now is the time to be recognized for your hard work and accomplishments.

Apply today! Applications must be in by MAY 25, 2018

The SITE Board of Directors is pleased to invite nominations for the Lois A. Markovich Innovation Award to recognize the accomplishments of our members. The Innovation Award is presented each year in conjunction with the annual conference.

The winner will be recognized at our 2018 Conference in Spokane, WA. The award recognizes organizations for new and innovative training programs as well as commitment to continued improvement through innovation. Examples of projects that have received past awards include:

- Train senior examiners to handle intellectual property claims to respond to a growing number of intellectual property loss exposures.
- Interactive employee onboarding program.
- The project was to create an interactive and engaging virtual learning space for all employees and leaders.

Submissions should be limited to two pages in the format of your choice and should contain the following information:

1. The purpose of the initiative
2. People and resources involved
3. Dates of implementation
4. What was done (i.e. training, consulting, research, development, facilitation, etc.)
5. What was innovative about the approach
6. Results achieved
7. Other pertinent data may also be attached

Only SITE members who lead or were involved in the initiative are eligible to win. You may nominate your own organization.

This is an excellent way to reward those "concealed trainers" and subject matter experts who do an excellent job. Gaining this elite recognition for your company at the 2018 Conference in Spokane, WA will enhance your standing as well. If you are selected for this year's award, SITE requires that you share the results of your initiative with SITE membership by writing an article for our communications and by either conducting a concurrent session at the 2019 Annual Conference in Memphis, TN or present/participate in a SITE webinar during 2018.

Please send your submissions to Deborah Davenport, Immediate Past President no later than May 25, 2018.

ddavenport@germaniainsurance.com

Save the Date

Train the Trainer

April 24-25, 2018
Great American Insurance Group
301 E 4th St
Cincinnati, OH
Register by:
January 25, 2018

Monthly Webinars

11/17: LinkedIn for Trainers – Greg Johnson from IEA

12/8: Considerations in Becoming a Provider for Adjuster CE – Jordana Robinson from Great American Insurance Group

SITE Socials

Nov 16th 6pm-8pm Marcella's Short North 615 N. High Street
Columbus, Ohio 43215
(614) 223-2100
RSVP:
marcia.moore@brickstreet.com

Annual Conference

June 23, 2018 Pre-Conference Event - Barrister Winery

June 24-26, 2018 The Davenport Grand Hotel Spokane, Washington

June 27, 2018 Post-Conference Event - Whitewater Rafting

For more information on these educational opportunities visit our website: http://www.insurancetrainers.org/

Collaborative Learning as a Solution for Retraining

Angie Septer, Training Specialist, Nationwide Insurance

It's one of the most dreaded words a trainer can hear: retraining. Whether the need stems from ineffective training the first go round, lack of learner accountability post-training or a slew of other causes, when a trainer receives a request for retraining, you can guarantee they'll have their work cut out for them.

When I heard this word in November 2016, it was actually the second time I was receiving a retraining request for this specific topic and training audience. A new claims processing system had been rolled out to claims associates beginning in June 2015, and while adoption of the new tool was a bumpy road for all impacted, there was one group in particular who really struggled with the change. They were brought onto the new system in October 2015, received their first retraining in March 2016 and by November, due to retention issues and leadership changes, were looking to receive a second round of retraining.

As an instructional designer, I racked my brain trying to come up with a new and effective way to train this group. The challenge I was facing was that while I had previously become a SME during the year in which I was dedicated to rolling out the new system, by November 2016, I had been out of the tool for months, and there were continual enhancements and defect updates being made. At this point, the associates using the tool day in and day out should have achieved a much higher level of expertise in it than I now had.

The solution I came up with was 'Claims Conundrum' – a collaborative learning activity in which learners were divided into groups of three and challenged with the task of completing a complicated, hypothetical claim from start to finish. The scenario I created tested for all of the complex processes the group could encounter – paying a beneficiary, handling a predeceased beneficiary, processing the unclaimed funds of a beneficiary who had been deemed abandoned and handling the death benefit of a beneficiary who was disclaiming proceeds. 'Claims Conundrum' took all of the scenarios a Claims Specialist would eventually be presented with and combined them into one claim.

The biggest challenge, and in my opinion, most valuable aspect to this setup was that the claims processing tool required a specific order for handling and processing these different beneficiary scenarios. This required learners to use critical thinking in their processing in order to identify any gaps or issues they could come across later in the claim. All of the scenarios were processes they had previously been trained on, but this activity gave them the chance to practice the scenarios relative to one another in a safe, test environment within the tool. What follows are some tips I acquired around using collaborative learning successfully.

Tip #1: Create a level playing field

One of my goals with this activity was to not only encourage collaborative learning but to also encourage peer learning. I tried to increase the likelihood that peer learning would occur by dividing learners into groups ahead of time based on their quality scores. I purposely grouped learners with lower quality scores with those who had higher scores. This allowed higher performers to help guide and teach those who were struggling. It also allowed me to ensure that I grouped more tenured associates with less tenured ones, which was especially important with the team's recent turnover rate.

Tip #2: Incentivize critical thinking

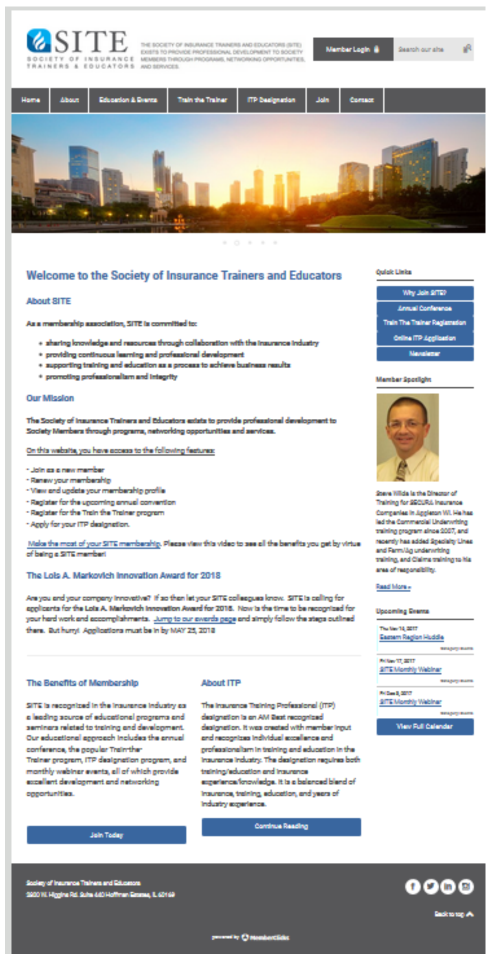
Included with each activity packet was a stack of ten tickets. The goal of the activity was to fully process the claim, and at the end of the quality check, be the group with the highest number of

(Continued on page 9)

SITE Connect: Tips & Tools

Suma Elwell

At SITE ,we are constantly striving to build the insurance training community. To foster this, we have set up multiple channels to share information and resources. We have a growing social media presence, in addition to our quarterly newsletter InSITE and our website. Here are some ways you can connect with your fellow learning and development professional in the Insurance Industry:



LinkedIn: You can access SITE LinkedIn page at https://www.linkedin.com/groups/797677. As our LinkedIn member, you can post articles, share your insights on insurance training, and learn from other SITE members. You can also keep track of the upcoming events and programs offered by SITE.

Facebook: You can access SITE Facebook page at https://www.facebook.com/pages/SITE-Society-of-Insurance-Trainers-Educators/126935793994263. Please join us, like us, and share your SITE moments with us on Facebook.

Twitter & Instagram: If LinkedIn and Facebook are not your preferred media, we also have Twitter and Instagram accounts where you can follow and post your SITE updates.

Twitter: https://twitter.com/SITEtrainers

Instagram: https://www.instagram.com/SITEtrainers/

Google Business: We are constantly looking for ways to reach out to our members and provide them resources and avenues to communicate with us. For these reasons, we have set up the Google Business account.

If you have a gmail account, accessing Google Business is simple 3 step process:

- Do a Google search for "Society of Insurance Trainers and Educators".
- You will see our business listing on the right side of the page.
- Click on "Write Review" to provide us your feedback. You will need to log into your gmail account prior to providing us your feedback. SITE updates and resources can also be found here.

InSITE: I hope you enjoy reading our quarterly newsletter where we share valuable articles on learning and development as it relates to the insurance industry. If you are not receiving these newsletters electronically, please have your IT department verify that you have whitelisted site@memberclicks-mail.net. You can access the newsletters on our website at https://site.memberclicks.net/insite-newsletter . We are always looking for good articles for our newsletter. If interested in contributing, please contact office@insurancetrainers.org.

Slide Presentations and Presenting from Them

Kevin R. Milner, MBA, CIC, ITP
Insurance Program Director
Gold Coast Schools (Tamarac, FL)

Slide presentations are an effective tool for engaging visual and auditory learners, but depending on the design and usage, the presentation can become a distraction.

When presenting in a live setting one must consider its audience. The last thing a learner wants to do is to be put to sleep by the presenter reading slides. As a presenter, you should consider some of the following practices.

Be familiar with the presentation before you begin
Many lecturers believe themselves to be Subject Matter Experts (SMEs) so they can speak of the content on cue. That is great for network gatherings but what about for that formal presentation? The only way to prepare for your presentation is to practice. Be familiar with the order content, your transition points, and most importantly, the purpose or goal of the presentation. Remember, what is it that you want your audience to know?

Paraphrase the material. Do not read directly from the slide
One method of keeping your audience engaged is not to read each slide to them verbatim. Although you need to be prepared and know what is on each slide, you should be comfortable enough to paraphrase its content. This allows you to add a personal dimension to the presentation.

Face the audience
Facing the audience is more than just a courtesy, it is a form of engagement. What if a member of the audience has that "deer in the headlights" look on their face? If you are not facing them, you cannot react to it. Furthermore, if your audience feels that you are ignoring them, their levels of energy and participation will begin to diminish.

Do not hide behind the lectern[1]
Lectern etiquette is an important tool for every public speaker. Many see the area behind the lectern as a safety zone; but in truth, if used inappropriately, it can become the danger zone. Lecterns block you from your audience, which can hinder you from connecting with your listeners.

So how do you prepare to utilize a lectern? Place your notes on the lectern prior to beginning your talk. If that cannot be done, make sure you take the time necessary to setup your lectern before you utter your first word. Using notes can be a distraction. Therefore, place a glass of water on the lectern. If during your presentation, you need to look at your notes, simply walk back to the lectern to take a drink. Pick up the glass and while drinking casually glance over your notes.

If you decide to stand at the lectern, try standing to the side. When leaving the lectern, leave your notes and props. Do not end your presentation by gathering-up your belongings. Instead, end with the thunderous applause. You can pick up your items afterwards.

Do not anchor yourself to your computer. Use a wireless device to advance slides
With today's technology, the changing of slides can be done remotely with a wireless device (pointer, mouse, etc.). This allows for a smooth transition between slides and concepts. When using these devices, take the time to practice with them and see how they work. Does it have a laser pointer? Can you blank a screen? Will it work from the back of the room? If using a device that requires a network connection make sure you have access and the technology works. Using a device, such as a smart phone, that has connectivity issues, can become more of a hindrance than a help.

Pay attention to your audience, not the slides
Slides are for your audience, not for you. The fewer the words the better. Each slide should be about a single concept and should highlight the key points. Remember, a slide show should not be a teleprompter.

[1] Merriam-Webster Dictionary: A lectern is a stand used to support a book or script in a convenient position for a standing reader or speaker. A podium is a raised platform for a speaker, performer, or the leader of an orchestra.

Choosing an LMS: What Does Custom Really Mean?

Samantha McClintock, Marketing Specialist, Roundtable Learning

You've probably heard the word "custom" tossed around a lot in the learning and development world. We hear it too, and many times it leaves us scratching our heads. Customization means "the action of modifying something to suit a particular individual or task," but too often, the customization of learning management strategies and systems comes down to a branding effort rather than a building effort.

So many clients come to us because they're tired of their off-the-shelf, boxed-in LMS solution that was promised to be customizable but isn't. Just this week, we heard: "They said it would be custom, but all they did was put our logo on it. Now we're locked into a contract and the LMS doesn't do what we needed it to do."

If that sounds familiar, how do you figure out if an LMS vendor can truly customize your learners' experience? To get the customization you need, we suggest you follow these four steps:

1. Evaluate your current situation.

What is your number one complaint about your current LMS? Survey your learners, administrators, and management, to learn what they truly need out of an LMS. Make a list of the gaps and what tools would fill them. Note the current cost of your LMS (or, the cost of not having an LMS) and any costs for integrations, hosting, changes, etc. Gather metrics around usage and engagement so that you have a baseline for comparison.

2. Do your research.

What companies offer custom learning management systems, and how much does the word "custom" cost? Is customization part of their process, or an added fee? Do they consult with you first to understand your needs, or give you a boxed solution and make small tweaks to the core?

3. Define your expectations.

What does customization mean to you? Many companies treat customization as a branding exercise. Are you looking for an LMS that has your colors and logo, with the functionality of an off-the-shelf, standard LMS platform? If so, you can get by without full customization.

If you're looking for a customized platform with integrations, modules, and paths that are specific to your company and your vision, then you'll want to define those expectations early so that you can have conversations about them with vendors.

4. Ask the right questions.

Understand how much customizations cost by explaining exactly what you want. If you pay for a boxed solution and then ask for customizations later, you may have to pay a lot more than you originally budgeted. Ask what's considered custom and what's included in the development and implementation fees. Ask how custom requests are handled and if changes and additions can be made post-implementation.

(Continued from page 5)

tickets remaining. Learners were able to exchange a ticket for the answer to a question as they went about their claim processing. At the end of the quality check, one ticket was deducted for each error found in their claim processing. This meant that if learners were unsure of how to proceed with a certain task, they had to decide if they wanted to forfeit a ticket to ask a question or risk potentially losing that ticket during quality check if they ended up making an error in their processing. The goal of this approach was to challenge learners to critically think through the processing steps themselves, rather than rely on the trainer to provide guidance on what action or direction they should take.

Tip #3: Involve everyone

In order to prevent learner apathy and to encourage engagement, the activity required that each group member take on a role. One member was assigned to "drive" the mouse and do the actual processing within the claims tool, though it was made clear it was the entire group's responsibility to successfully and accurately guide the group's driver through claim processing. Another member was responsible for being the ticketholder tasked with managing the tickets and surrendering any tickets turned in for answers to questions. The final group member was the record keeper and was responsible for keeping a detailed and accurate log of all of the steps the group followed during the processing of their claim.

Tip #4: Mirror the real world environment

It's important that the classroom reflect real world working conditions as much as possible. To help with this, learners were allowed to utilize any and all printed or electronic resources that they would normally have available to them when performing their jobs. This included job aids and procedure documents.

Tip #5: Set clear expectations upfront

In order to set clear expectations and encourage learner success, within their claim packet, all groups were provided with a copy of the benchmark checklist I would use to quality check their claim. This transparency was important because it allowed them to process and make decisions based on the items identified by the trainer as learning priorities.

Tip #6: Create opportunities for feedback

The processing log kept by the record keeper in each group was an invaluable tool for me as a trainer. It provided me with insight into why each group followed the steps they followed and in the order that they did. It was the corporate equivalent of "showing your work", which you likely remember from school. The processing logs allowed me to provide specific feedback to each group post-training around what steps and tasks they did well and corrective feedback around those items that were opportunities for improvement.

As an instructional designer, I would advocate for the use of collaborative learning in many scenarios, but through this experience, I've found it especially effective in solving for retraining needs. Of all of the training classes I've designed and developed, this retraining stands out as one of the classes I'm proudest of – not because it garnered the highest learner survey scores but because I truly believe it was one of the most valuable. As each learner encounters the scenarios we practiced in their daily roles, they'll have a reference point and classroom experience to fall back on as their guide.

(Continued from page 3)

Where to use Quick Reference Guides

It has been my experience that Quick Reference Guides work exceptionally well when training users on new systems, outlining process steps, or where staff is learning a process based on decision tree analysis. A characteristic that makes Quick Reference Guides more functional is if there is one to correct way to process or perform a task. It is here that Quick Reference Guides shine.

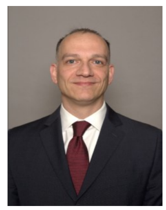
I like to build Quick Reference Guides as a "leave behind" document. The memory of training fades, but those Quick Reference Guides can stay on the user's desk for many months or years. I make sure to have my contact information on the quick reference document as well so learners know who to ask when they have questions after training. Finally I make sure that quick reference documents have an edition date and/or version number so that subsequent amendments can be appropriately documented.

2017 - 2018
Board of Directors

President
Sandra Colley, MBA, AINS
Learning & Performance Training Mgr
Nationwide
608-397-2870
e-mail Sandra »

Immediate Past President
Deborah Davenport, CIC, ITP
Marketing Development Specialist
Germania Insurance
512-284-3901
e-mail Deborah »

VP, Annual Conference
Brad Gutcher
Manager-Segment Development Insurance
I-CAR
614-205-6200
e-mail Brad »

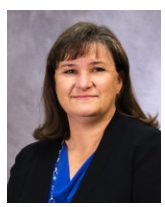


Secretary/Treasurer
George Vakalopoulos
Training Specialist
Alliant Insurance Services, Inc.
617-535-7231
e-mail George »

VP Marketing
Suma Elwell
VP of Organizational Development and Strategic Planning
Wisconsin Reinsurance Corporation
608-441-3138
e-mail Suma »

VP Member Services
Evelyn Jorgensen, SCLA, AIC, ITP
Learning Services Manager - Claims
Selective Ins. Co. of America
973-948-1649
e-mail Evelyn »

Regional VP - Western
Helen Gomez
Senior Training Specialist
Liberty Mutual
630-360-7571
e-mail Helen »



Regional VP - Central
Kate Manthey, CPCU, ITP
Associate Director, Center for Insurance & Risk Management
University of Wisconsin - Oshkosh
920-424-1424
e-mail Kate »

Regional VP Southern
Sherry Moor, AAI, ITP
Training Consultant
American Strategic Insurance
866-274-8765 x 1347
e-mail Sherry »

Regional VP Eastern
Marcia Moore
Business Process Analyst
Brickstreet Insurance
304-941-1000 ext 5757
e-mail Marcia »

Member-at-Large
Elise Quadrozzi, CPCU, AIC, AU, AM, ARP
Director - Business Development
I-CAR
224-828-1866
e-mail Elise »

Member-at-Large
Arthur Carvajal, Esq.
Executive Editor and General Counsel
WebCE, Inc.
972-616-1149
e-mail Arthur »