InSITE

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Information for the Society of Insurance Trainers & Educators

SITE SOCIETY OF INSURANCE TRAINERS & EDUCATORS

President's Message

Courage

Brad Gutcher, SITE President - gutcheb@nationwide.com

In this article I will continue with part two of my trilogy of how my Mission statement of, "Honor Courage and Commitment" can be applied to our jobs as Learning Leaders by focusing on Courage.

Courage can be defined as the ability to do something that you know is difficult or dangerous. This hits home for Learning Leaders on two fronts. First, designing, developing and delivering training at a world class level is difficult work. Secondly, there is danger involved. Your training may not align with the business unit's strategy or change the behavior of the associates in the manner intended or you may have to push back on your customer and recommend a different approach.

How do you accept projects for developing new training programs? Do you have a vetting and prioritization process that ties back to the strategic plan of the business unit or are you an order taker? Order taking makes saying no to a project very difficult and the real danger of this could be that your team's valuable resources are pulled away from a project that supports the strategy of the business unit and ultimately provides better service to the Policyholders. With a strong vetting and prioritization process you can ensure that your training projects are providing the business unit with training solutions that are essential for achieving the strategic goals.

The difficulty of designing and developing a program is a result of many variables and unknowns and determining how they relate to one another. I liken it to solving a large jig-saw puzzle. Pieces of this puzzle include: understanding what the desired change or performance problem is, conducting a training needs assessment and developing the learning program and finally designing and conducting evaluations that measure the success of the training in the short term and for long term sustainment. These process steps are complicated by other variables such as, who is the customer, who is the audience, are there SMEs available, how will the material be delivered? The list goes on and the pieces can be difficult to put together. Selection of your learning and development team is critical here as company strategies can shift quickly, therefore we need to be able to refocus and "retool" our teams to meet this moving target proactively. Therefore it is crucial that our teams contain confident people with talent to design and deliver innovative programs along with the ability to engage with business stakeholders.

Acts of courage happen every day in learning and development organizations. Go out and make a difference today!

NO HIGHER HONOR,
Brad Gutcher

THE POWER OF SITE

In this issue:

Welcome New Members!

CENTRAL

Dennis Dietz
Director Agency Training and Development Western & Southern Financial Group

Suma Elwell
VP of OD & Strategic Planning
WRC

Sonja Jacobson
Member Education Speciallist
Arbitration Forums, Inc.

Monica Salmons
Underwriting Training Specialist
Missouri Employers Mutual Insurance Co

WESTERN

Chad Americk
Senior Training Specialist
Liberty Mutual

EASTERN

Mike Constantine
Training & Development Manager
Homesite Insurance

Justin Moranski
Moranski
Selective

Danielle Tangorra
Manager, Claims Training & Development
Crum & Forster (U.S. Fire Insurance Company)

SOUTHERN

Debra Lee Richardson
Senior Lecturer
University of North Texas

Josh Roberts
Senior Sales Center Trainer
HomeInsurance.com/ RVi

Highlighting the Path to Limitless Insurance Careers

By Bruce Fisher, SITE Treasurer - fisher@theinstitutes.org

Nearly half of today's insurance professionals could be retired in a decade. Most of the young people suited to filling those openings don't currently know about those opportunities.

That's the short version of the challenge faced by the insurance and risk management industry. To make sure that there is an effective pathway leading talented millennials to our industry, The Institutes, at the request of the insurance industry, are collaborating with dozens of partner organizations to address just this through an effort called MyPath: Insurance. It's Limitless.

The initiative aims to educate and excite the next generation about the limitless potential of insurance careers. Anchored by a website – www.InsureMyPath.org – that features internship opportunities and career information, it is a nationwide effort to raise awareness about the more than 400,000 job opportunities our industry is estimated to have between now and 2022, according to the Bureau of Labor Statistics.

You can get involved! Encourage your organization to become a MyPath partner, leveraging this industry-wide platform to attract candidates for internship opportunities and amplify your own message. Tell your students, friends, family members, colleagues and anyone else about MyPath and the information they can find there. And follow and share our social media accounts, @InsureMyPath and Facebook.com/MyPathInInsurance.

We know that insurance and risk management careers offer stable, fulfilling, flexible opportunities. It's time to highlight the pathway for the next leaders of our industry. For more information, go to www.InsureMyPath.org/GetInvolved.

Conference

Meet Your Keynote Speakers!

Reaching New Heights of Success

SITE 2015

We are excited to introduce you to the three keynote speakers selected for the 2015 SITE Annual Conference in Colorado Springs, CO. Mark your calendars for June 20-24 and get in on the early-bird rate by registering today! These three keynote speakers are sure to inspire, motivate, and help you Reach New Heights of Success. You can read more about each on these speakers and their presentations on our website.

Byrd Baggett, CSP

Opening keynote speaker Byrd Baggett, will share insights and strategies that will help you and your teams reach the richly rewarding Season of Significance through his presentation 'Dare to Grow®: How to Build Relationships that Stand the Tests of Time & Change.'

Dr. Ray Jimenez

The second day keynote speaker will be Dr. Ray Jimenez from Vignettes Learning. In this presentation, 'Creating Engaging Compliance and Technical Learning Programs', he will share the methods on how to enhance technical and compliance learning with critical events and high impact consequences that add context to the lessons. And as a bonus, Dr. Jimenez will also lead a concurrent session for those who want to dive in deeper.

Karen Ruth White

Monday's keynote speaker Karen Ruth White, will be presenting 'Outta SITE, But Not Outta Mind; Techniques For Training With A Lighter Touch.' This high-energy comedian and morale consultant will not only be entertaining, but will show us how to deliver serious content in an engaging way (humor) while remaining professional...a fine line for insurance trainers.

Look What You Missed in Indianapolis at Train the Trainer.

By Christine Nilsen Marciano, CIC, ITP, CLCS, SBCS – TTT Program Administrator - marciac@nationwide.com

When our son Matthew was just a little guy, he didn't want to take naps for fear he would miss something. Gramma Sylvia solved it by telling the tyke that she would set up a camera to record everything. He could watch the videos when he woke up. Amazing.

TTT covers adult learning theory, needs analysis, learning design, delivery and oh, so much more. The mind reels. Look what you missed in Indianapolis!! Sharon Koches, ITP, CPCU, RPLU, AU, AAI, the Vice President of Insurance Operations of North Carolina IIAB, and a rock star on our TTT faculty, led this band of professionals on a brainwave adventure. Check out how smart they all look!

Several of these brave folks are on track for their ITP (Insurance Training Professional) designation.

What's the ITP, you ask?

We are so pleased you've asked. The ITP is the only insurance training designation available (at least that this author knows…) The ITP requires several industry check points. 10 years in the industry, 5 years in training, and an educational component. There are several ways to achieve the educational portion. The coolest way is an online semester that culminates in a live 1.5 day session. The course costs $700 for SITE members.

Plan for 2015 now! Consider squeezing the last bit of 2014 development dollars on the TTT. Enroll now and save your spot in the live session. We have 4, so far. Yes, we are negotiating a few more. Sweet, right?

Questions? You can TTT-totally email me at marciac@nationwide.com. Don't call me Marcia. No one does.

Pictured above (left to right): Cody Stratton, Liberty Mutual; Jason Davis, Allstate; Elise Quadrozzi, I-Car; Gayle Curtin, Liberty Mutual; Candace Fitzgerald, Allstate; Shelie Leverett, EA Renfroe; Jack Jennings, Willis

2015 Train the Trainer Sessions

Train the Trainer Session	Online Semester Begins	Registration Deadline
Feb 12-13, 2015 Atlanta, GA – Crawford & Company	11/24/2014	11/17/2014
April 21-22, 2015 Seattle, WA – Safeco Center	1/26/2014	1/19/2014
June 19-20, 2015 Colorado Springs – Antlers Hilton	3/23/2015	3/16/2014
October 7-8, 2015 Branchville, NJ – Selective Insurance	7/13/2014	7/6/2014

Member News

The Power of SITE…is all around us!

By Jeff Horn, SITE Vice President of Member Services - jeffrey.horn@libertymutual.com

Fall has always been a special time for me – a transition into a season of activity, projects and new beginnings. I enjoy watching the leaves turn colors, the World Series, college football and participating in activities that come with this time of year.

In September, we completed our board meeting in Colorado Springs focusing on strategy, goals and planning for the future of SITE. It is an exciting time for all as we look at the progress our conference committee is making, the workshops being hosted in the regions and all the other projects that support our mission; to provide professional development to members through programs, networking opportunities and service. The Power of SITE is all around us.

As VP of Member Services I am privileged to work with four of the most talented, brightest and hardworking Regional VPs that SITE has ever experienced. Treg Camper is organizing some awesome activities out west. Shelly Douberteen, Central Region VP, recently hosted the Train the Trainer in Indianapolis. Eastern Region members have participated in webinars, workshops and virtual meetings with Mary Ann Cooke and Southern Region members don't miss out on the fun events Bruce Stauf has in store for you. This really is a special time of year. Don't miss out.

2015-2016 SITE Board of Directors–Nominations

By Brenda Davis, SITE Immediate Past President - bdavis@alliant.com

Nominations for the 2015-2016 Board of Directors are now OPEN!

Each year SITE has Board positions available for members interested in becoming an integral part of the Society's Board of Directors. Serving on our non-profit Board is a great way to give back to our profession and to build your leadership skills! In addition, you get to serve with remarkable SITE members!

We encourage you to learn what is involved in serving on SITE's Board of Directors by any or all of the following:

1. Review the descriptions of the Board positions.
2. Review our Society's bylaws to better understand the mission of our organization.
3. Read archived board meeting minutes on the SITE website to learn about the major issues discussed in prior meetings.
4. Review archived issues of the InSITE publications on the website.
5. Visit with current or former Board members to gain their perspective of the various board positions including the benefits of being on the Board, time commitment, etc.
6. Board member terms of service officially begin on July 1, 2015, the beginning of the next Society year.
   Board positions include:
   - **President** (1-year term)
   - **Vice-President Annual Conference** (1-year term)
   - **Vice-President Member Services** (1-year term)
   - **Vice-President Marketing** (1-year term)
   - **Secretary** (1-year term)
   - **Treasurer** (1-year term)
   - **Eastern Region Vice-President** (2-year term)*
   - **Western Region Vice-President** (2-year term)*

Online applications should be submitted by December 15, 2014.

>> Click here to complete a Board application.

Do you have questions or require additional information?

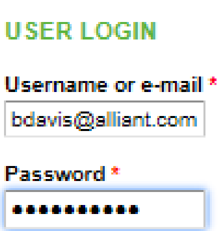
If so, please contact Brad Gutcher, SITE President at gutcheb@nationwide.com, Alisa Bell, SITE Executive Director at abell@synergosamc.com or Brenda Davis, SITE Immediate Past President at bdavis@alliant.com.

* *We generally have 2 new RVP terms each year (e.g. in 2015 Eastern and Western RVP's begin their 2-year term and in 2016 the Central and Southern RVP's will begin 2-year terms).*

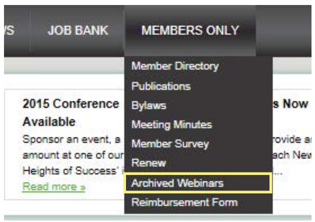
Did You Know...?

Members have access to webinar recordings on a variety of informational topics.

1. Go to SITE's website at www.insurancetrainers.org
2. Log In



3. On the navigation bar at the top, roll over Members Only and select Archived Webinars



4. A list of recorded webinars, by date appears in the list. Some include supporting documentation.

2015 Lois A. Markovich Innovation Award Nominations

By Brenda Davis, SITE Immediate Past President - bdavis@alliant.com

The SITE Board of Directors is pleased to invite nominations for the Lois A. Markovich Innovation Award again this year 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 2015 Conference in Colorado Springs, CO. The award recognizes organizations for new and innovative training programs as well as commitments to continued improvement through innovation.

Examples of projects that have received past awards include:

- Trained senior examiners to handle intellectual property claims to respond to a growing number of intellectual property loss exposures.
- Designed a new approach to training how adjustments on Health claims affect the amount of interest paid.
- Created an interactive and engaging virtual learning space for all employees and leaders.

Your submission should be limited to two pages 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 led 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 2015 Conference in Colorado Springs, CO will enhance your standing as well. If you are selected for this year's award, we request you share the results of your initiative with SITE membership through an article for our communications and/or by conducting a concurrent session at the 2016 Annual Conference in Minneapolis, MN.

Please send your Innovation Award submissions to Alisa Bell at abell@synergosamc.com

Deadline is March 15, 2015.

Regional News

How Do You Get Your Creative Juices Flowing?

By Shelly Douberteen, Central Region VP - shelly.douberteen@libertymutual.com

As a trainer sometimes it's so easy to come up with a fun game or a creative way to explain something on the fly while you're in the classroom. What about when you are doing a lengthy project or instructional design work? How many lessons can you build around a game or a role-play before you hit that brick wall and you just can't think of any other ways to make the lesson fun and different? This is one of my biggest challenges, and honestly it's a daunting feeling and can even cause some anxiety.

So what do I do to get over this mental hurdle? Here are a few tips I have for you:

1. **Just set the mouse down and step away.** I think sometimes it's best to completely disengage yourself from whatever is causing you the mental block. Also, it gets you out of that anxious mindset when you get your body moving, and once you're no longer anxious you're able to start thinking clearly again.
2. **Sleep!** No, I'm not talking about taking a nap at your desk. I'm talking about making sure you get enough sleep every night so that when you wake in the morning, your mind is fresh. Sometimes my best ideas come when I'm having my coffee and getting ready for work.
3. **Journal it.** Figure out when your brain is its most creative and use those times to your advantage. When those moments do occur make sure you're ready to journal. For me, my brain wakes up in the middle of the night with an awesome idea, and I've found it's best to just not fight it. I write those ideas down when they come to me even if that means it's midnight. I've learned over the years to keep a small journal in my night stand for this very thing.
4. **Brainstorm.** Do you have writer's block? Want to just bang your head on your desk until you think of something? Probably not a good idea. I always find it valuable to seek out a friend or coworker, talk about what I'm working on, and see if they have any thoughts or suggestions that can help me. Sometimes even the simple process of explaining it to someone else is all it takes to open the creative flood gates.

No two minds are alike. What gets my creative juices flowing may not work for you. Don't get discouraged. It's important to keep searching for the right combination for you.

Eastern Region Workshop a Huge Success

By Mary Ann Cooke, Eastern Region VP - maryann.cooke@stateauto.com

Paul Balbresky ITP, past president of SITE and owner of Balbresky Consulting Services is our guest author this month. Paul is a nationally recognized instructor, author and speaker. In true Paul fashion, he is willing to share material he developed and presented during a recent SITE workshop in the Eastern Region. Please read his article below regarding the workshop.

Using Case Studies By Paul Balbresky, ITP - pbalbresky@verizon.net

Nineteen attendees from training and business units, members and hopefully future members of SITE spent a profitable hour and a half at Crum and Forster Insurance in NJ experiencing, learning about and discussing how to use case studies in learning situations. Host Mark Flamendorf orchestrated the meeting and provided refreshments and a wonderful venue for the interactive meeting.

I facilitated the workshop and used a case study as a learning exercise and a model from which participants could build their own. Cases are different from Discussion Scenarios in that they reflect work situations that have already occurred. Following analysis of the situation, the actual outcome is revealed. This then prompts another round of discussion on how reality differed from what was decided by the breakout group. “It’s a nice tool to use to stimulate thought and an interesting variation on the discussion scenario,” said Paul.

A new SITE member commented “Very much liked how we went through an actual case study and then debriefed on it.” “Got some great tips and ideas,” said another. “This is some of the value our regional meetings bring to members and is also a great opportunity for networking” reflected Mark.

For more information about Cases contact me at pbalbresky@verizon.net. If you have an idea for a session or want to host, please contact your Regional Vice President (RVP).

Greetings from the South

Bruce Stauf, Southern Region VP - Bruce_Stauf@us.crawco.com

I recently returned from the 2014 CPCU Conference in Anaheim, CA, which provided an opportunity to broaden one’s knowledge, in addition to the networking with other insurance professionals. The program was well attended by several thousand CPCU’s, new CPCU conferees, and supporters (including families). A major take-away from this program is the dedication to professionalism through learning, much of which comes through well designed training. No doubt there were a number of insurance trainers throughout the attendees, many of whom may not be familiar with SITE. I emphasize the word “Dedication”. It took a lot of hard work, personal hours and dedication to obtain their CPCU designation.

The conference provided a wide selection of educational topics, with something for every interest, and most sessions offered CEU’s. It was both a training and learning opportunity. Like our SITE program, much of the work involved in making the CPCU Society go is done by volunteers, at the national level and especially at the local Chapter level. SITE too relies almost exclusively on the volunteer help provided by… all of us. One of the ways we can help our SITE organization grow is through our connections to other insurance organizations, like CPCU, through which we might meet other training professionals who may not be familiar with SITE and may have an interest in joining. By networking with these folks, especially on a local basis, we can provide them with information on all the benefits that are available by getting involved with SITE.

If you are thinking of having a social or workshop in your area, you may want to invite trainers that you’ve met through CPCU or other insurance organizations. Socials and workshops are a great way locally to provide them with information and new contacts within SITE. It is through your dedication to making our organization go and spreading the word, that SITE will continue to grow.

Way Out West

Treg Camper, Western Region VP - tcamper@allstate.com

It’s hard to believe 2014 is quickly passing. It seems like the time of year things should slow. But as business competition heats up, next year’s initiatives begin right now. Despite all these pressures, I encourage you to find time with family, friends, and co-workers to appreciate this special time of year that we are entering.

As you reflect on this year’s successes and failures and contemplate things you might do differently—consider this: Your public speaking skills are not only important to what we do as trainers but also important in the way people evaluate us. If we possess good techniques, people look at us favorably. If we hold onto poor techniques and habits, it takes away from our presentation and maybe even our credibility.

Over the past year, I’ve made a conscious effort to enhance my skills. And I can tell you—it is paying off. Specifically, I’ve focused on three things—projecting my voice, eye contact, and posture. You might be thinking that you don’t have an opportunity to speak frequently enough to get comfortable. Here’s a tip: Practice every day in every conversation. That way, when you hit the stage, you’ve developed better, more consistent habits!

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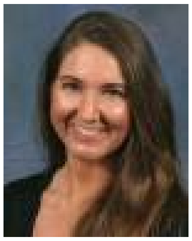

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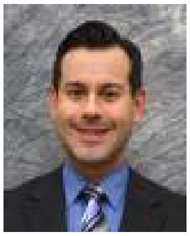

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