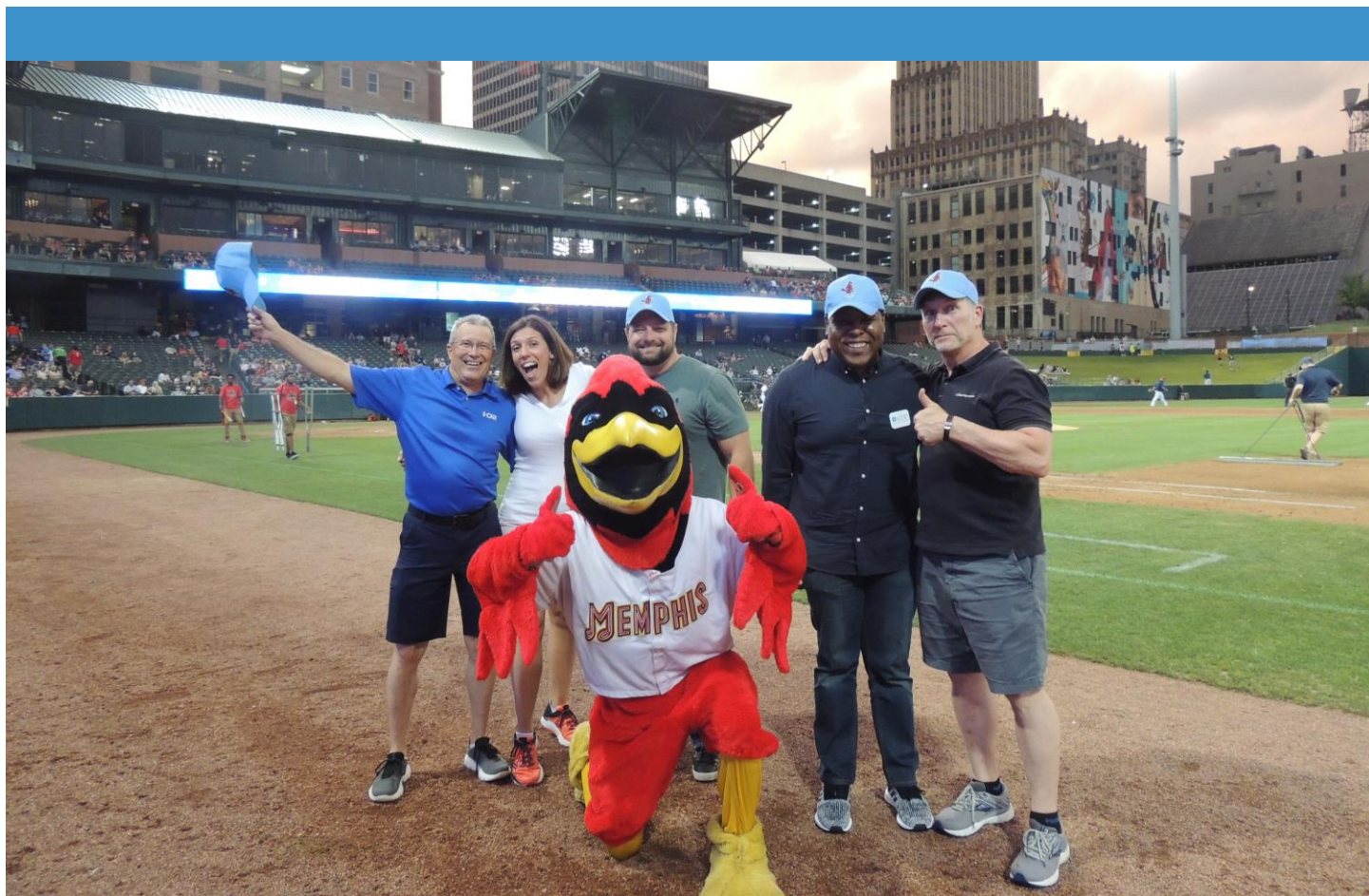


# InSITE



## FALL NEWSLETTER



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Plus Train the Trainer Dates & Locations

### Save the Date!

June 15 - 17, 2020, New Orleans, LA

Registration and event details coming this fall.





## PRESIDENT'S MESSAGE

Participate, Engage, Enjoy SITE!

Larry Nicholson, SITE President

Dear SITE members, colleagues and guests,

I am honored to have been afforded the privilege of serving as President of SITE for the 2019 -2020 term. As the leading society that provides certification and designation to individuals engaged in insurance training, we have an important role to play in setting the course for the future of our industry. I join a team of enthusiastic and passionate individuals on the SITE Board of Directors, and we are all eager to enhance the capabilities of the society and service to our members.

I am writing to convey my best wishes and sincere thanks to all of you as we wrap up a great annual conference in Memphis, TN and shift our momentum into the next calendar year. Before, I do anything else, I want to thank you for your ongoing commitment and dedication to SITE and our industry. The success of our society is parallel with the success of members like you and the success of our industry.

This year, you can expect continued programs and membership resources that will aid you in your jobs as insurance trainers. As technology continues to immerse within our industry, our jobs as insurance trainers has never been more exciting. We want to make sure that you are equipped and abreast with the tools needed to positively impact your line of work and your organizations. You can also expect to see later this year the new launch of SITE Podcasts. These podcasts will provide on-the-go listening and viewing of insurance training related topics and current events. We have also listened to you more closely and will be shifting our focus to offer more insurance training related content through our monthly webinars, InSITE articles, annual conference sessions, keynotes, and many more.

At the core of SITE and part of our mission is networking opportunities. To meet industry colleagues and to engage in discussions on insurance training related topics, you can connect with SITE and members on our social media pages. We have an active LinkedIn, Facebook and Twitter page. Many of our members have gathered new business ideas, solutions to business challenges and have gained long lasting relationships through networking with fellow SITE members via events and social media networking. For the continued health of SITE, your active participation is essential.

We will soon be sending out a membership survey, and in this survey, we are asking you to provide feedback on how SITE can continue to improve. Your feedback is invaluable to the SITE Board of Directors as we want to make sure that we offer programs, services and solutions that benefit you and your organizations the most. When you receive the survey, I ask that you take two minutes out of your schedule to complete it, it's very short "I promise".

Please contact me or any member of the Board of Directors with suggestions, feedback or just to brainstorm new ideas. I look forward to collaborating with you in the future.

Larry Nicholson  
President, Society of Insurance Trainers & Educators  
lwn15@my.fsu.edu  
813.892.3779

## SITE News



*Please click on the image above to watch a welcome message from SITE President, Larry Nicholson.*

### Welcome New Members!

We would like to welcome the following new members to SITE!

#### **Butler University**

Victor Puleo, CIC, CFP

#### **Federated Mutual Insurance Co.**

Cathy Hall, AINS, AIS, ACS, SM

LuAnn Johnson

Jackie Natzel, FLMI, ACS, HIA, API

Vicki Oatway, AIS, ACS

Amber Wolters, AINS, ACS

#### **Lincoln Financial Group**

Laurie Pearson

#### **Nationwide**

Sarah Braga

Tom Cieslewicz

Tim Futch

Cheryl Gamage

#### **Nationwide (cont.)**

Wesley Harkins

Andy McCauley

Todd Silance

Randy Michael Slutzah

Neil Surles

Joe Wojno

#### **Propel Insurance**

Jennifer Rain

#### **QA Claims**

Joe Leard, AIC, ITP

#### **Tower Hill Claims**

Michele Broadhurst, CPCU, SCLA

#### **WebCE**

Josh Klarin, JD

### Why Did You Join SITE?

Personal stories are often one of the most compelling ways to convince others to become a part of something which is meaningful to your life. Your SITE Board of Directors would like you to take this opportunity to consider WHY you are a part of SITE, and why you should be telling other people about our awesome organization! SITE is recognized as the insurance industry leader in educational programs and seminars related to training and development. Think back to when you joined. What motivated you to be a part of our organization? While we have this [webpage](#) dedicated to reasons why you should join SITE, we'd like to hear feedback from you as to WHY you joined. Your voice is important to us. Please feel free to drop us an [email](#), and let us know! And if this organization is important to you as evidenced by your commitment, why not tell someone else about it today? Catch the excitement! [Contact Us](#)



## Congratulations to SITE Train the Trainer Graduates!

SITE recently held a Train the Trainer programs in Memphis, TN and Scottsdale, AZ. Congratulations to our newest Train the Trainer Graduates!

### June 2019 – Memphis, TN

Allison Brand  
Yolanda Burnett  
Tom Carlson  
Melissa Dehn  
Evette Durrah  
Corrie Feavel  
Jessica Griffith  
Tai Williams  
Angela Lanehart  
Jennifer Lorrigan  
Jocelyn Rodgers  
Ryan Sims  
Robert Smith



### August 2019 – Scottsdale, AZ

Katherine Bova  
Andrew Gibb  
Elizabeth Nielsen  
Andrew Poso  
Jennifer Rain  
Renee Stoltz  
Stephanie Weakley



## SITE Congratulates New ITP Designees

The following individual(s) have recently received the Insurance Training Professional (ITP) Designation:

### August 2019

- Allison Brand, CFM, ANFI, AINS, ITP - Southern Farm Bureau Casualty Insurance Company
- Nick Burri, ITP - Frankenmuth Insurance

For a full list of our ITP's - please [click here](#).





KATE JAEHNKE

Acuity Insurance

Commercial Underwriting Consultant

## New Ideas, Connections, and Opportunities

While out at Train the Trainer in September of 2018 I kept hearing my facilitator talk about “Conference”. Being that I got so much out of the day and a half Train the Trainer session, I was intrigued by what this conference could offer. I was also slightly confused to why it was referred to as only “Conference” as somehow the preceding “the” had mysteriously disappeared. I was able to attend my first SITE Conference this past June in Memphis, TN. I had some preconceptions of what I might take away based on the list of sessions posted prior to “the” Conference, but I had no idea how impactful those sessions, or the connections I made, would truly be.

Being someone who both develops and facilitates training, I was able to attend sessions like Designing for Behavior Change, Creating Interactive Coverage Training, and Utilizing the Kirkpatrick Evaluation Methodology. Each of those sessions helped me take back items that I could immediately implement in the classroom the very next week. I spent the weekend after Conference integrating storytelling into my coverage form training, adding elements to create an emotional tie in order to carry that lesson through the weeks until they’d put it into action, and transforming our evaluation methods in order to truly get at results and behavior changes from training.

Branching out to areas outside my normal wheelhouse, I attended a session about Avatars in Soft Skills and Augmented Reality, which are things I never would have thought our organization would be capable of doing. I was able to arm myself with new ideas on how we could potentially implement these technologies into our future training plans.

I could go on for hours raving about all of the sessions and speakers I attended, and how much I was able to take back to improve our training program. But I’d be remiss if I didn’t talk about the people. The people in SITE are kind, welcoming, open minded, and the most supportive group I’ve ever met in the business world. Although our organizations may be competitors in the insurance world, as trainers and educators, we are all partners. After four days at the SITE Conference I left with so many connections and new friendships that I could lean on for support, advice, and guidance.

For those thinking about attending a future SITE Conference, here are my top four takeaways from this year:

1. You do not need to dress up professionally for the Pre-Conference Networking Event (so don’t go searching for a clothing boutique in downtown Memphis by yourself in 100-degree heat to find a nice outfit).
2. Branch out and go to any and all sessions you can because you have no idea what new ideas you might takeaway.
3. Meet as many people as you can, even if you’re introverted, the connections you make are so valuable.
4. Just go – you won’t regret it, I promise!

Although I am still on a mission to find the missing “the”, Conference is an opportunity that I would highly recommend not missing out on. The ideas you get, connections you make, and the opportunities you can create for yourself and organization are invaluable.

*Kate Jaehnke is a Commercial Underwriting Consultant with Acuity Insurance. She specializes in developing and facilitating training for the new underwriting training classes with a focus on Property Insurance. She also organizes and leads their annual Underwriting Workshop for 400+ people focusing on technical and professional development.*

## 2019 SITE Award Recipients



**2019 SITE President's Award**  
Brandon Huff & Evelyn Jorgensen



**2019 SITE Lois A. Markovich Innovation Award**  
Frankenmuth Insurance



**2019 SITE Henry C. Drewes Loyalty Award**  
Mary Bruggeman



**2019 SITE Corporate Award**  
Great American Insurance Group





FRANK HAYS  
CPCU, CIC, CLU, AFIS, ITP  
American Family Insurance  
Training Specialist

## Virtually Engaged!

I have to admit I have had to adapt quickly in my 17 years as a corporate insurance trainer or risk relevance. Not only is our industry changing very quickly, but add in the technology aspect, and the change has been almost mind-boggling. When our organization adopted virtual training, some years back, as part of our class offerings, I was not a fan at first. Loving the classroom and the dynamics of working with our audience in an in-person setting was exhilarating, challenging and fun. When our company went to offering classes virtually, admittedly I was lost. Not being able to see peoples' faces and judging where the class was going was a particular challenge. I knew the learning objectives and while the class content had not really changed the delivery method had, and I was befuddled.

Luckily, our company equipped our instructors and designers with some additional training that proved most helpful. Jennifer Hofmann, a pioneer in synchronous and blended learning, offered a session at our home office and I took the opportunity to attend one of her sessions on synchronous training. I was most impressed with her presentation and material. We were also provided with a book that remains an important resource for me today as I continue this wonderful journey of designing and delivering synchronous (virtual) training. *"The Synchronous Trainer's Survival Guide: Facilitating Successful Live Online Courses, Meetings, and Events, Live and Online!"* is a wonderful resource and no, I am not getting a commission for endorsing this book, but it is worth checking out if your responsibilities include designing and delivering virtual training.

Virtual or synchronous training is now a mainstay in our training world and while the platforms may change and evolve (our organization recently transitioned to Zoom™ from WebEx™) the fundamentals stay the same. So my key takeaways that have helped me over the years are as follows:

- **Keep it simple and short.** Much like what we hear about the average length of YouTube™ videos (which is just over four minutes), the shorter the better. Keeping your class engaged is a particular challenge and unlike as the Rolling Stones once said, "Time is not on your side". We all multi-task and as a facilitator/designer of virtual training, you must be constantly diligent of this fact. When designing virtual classes, I try not to break Jennifer's rule of ninety-minutes as a maximum length. If your content is more involved, considering breaking it up into multiple sessions. This is not always possible, and if you are required to go longer, consider taking a break. If you do utilize a break, contemplate using an online timer to keep the session on track. I have had good luck in shorter sessions lasting 30-45 minutes but again content will sometimes challenge on these shorter time frames.
- **Use a Producer.** Going alone can be a scary venture. Sometimes I feel like the Wizard of Oz pulling the levers, pushing the buttons, monitoring chat, all while facilitating a class. It can be overwhelming and when technology fails you, and it will at times, it is nice to have someone to assist or even have to take over the session if your laptop decides to die on you or go AWOL (blue screen of death!). Also, having two facilitators and two voices helps break up the monotony. I don't always have the luxury of

having a producer, but when I do, I feel the sessions are much better and it improves class engagement.

- **Keep your audience engaged.** Attempt to have your participants doing something every 3-5 minutes. This can be particularly challenging but be cognizant in building activities (whiteboard, polling, quizzes, breakout rooms, games, questions requiring chat response, etc.). I have also used pre and post-class communications, usually in the form of email, to improve engagement. Pre-class communications may include activities that require the participants to do something prior to class to help involve them in the content before the session and post-class communications to help recap and highlight references that I may have covered in the class.
- **Practice.** I can't emphasize this enough: practice, practice, practice. When our organization transitioned from WebEx to Zoom, I was not a happy camper. Having learned the ins and outs of WebEx and its capabilities, I was totally comfortable with the platform but having to master a new system has had its particular challenges. I'm still learning Zoom, but having had lots of practice with WebEx, I find that I'm not afraid to try new things and venture outside my comfort zone. Having recently invested in a green screen has allowed me to utilize virtual backgrounds which have made me more comfortable turning my camera on. Speaking of cameras – use them! At the recent SITE Conference in Memphis, I was fortunate enough to be at a roundtable discussion with a fellow trainer who stated that their organization requires that participants and facilitators all have their cameras on during their virtual classes. This improves engagement and accountability. I often have 50-100 participants in my virtual classes so requiring participants to have their cameras on is not practical, but I now have my camera on consistently. I'm glad to report it has shown positive results.

As designers and deliverers of virtual training, the challenges are similar to the physical classroom, but recognizing that technology can assist us in different ways toward achieving our learning objectives is crucial to helping provide our learners with what they need most in a timely fashion. Have fun and keep it engaging!

Hofmann, Jennifer, et al. *The Synchronous Trainer's Survival Guide: Facilitating Successful Live Online Courses, Meetings, and Events, Live and Online!*. Pfeiffer, 2004.

*Frank's insurance career has spanned over 35 years working with four different insurance companies in the Midwest and Western United States in various capacities. For the last 17 years, Frank has served in a training capacity for American Family Insurance designing and delivering curriculum for the employees and agents of American Family. He is married to Patricia and resides in Lawrence, Kansas enjoying time with his four children, six grandchildren, and one great granddaughter. Frank has been a member of SITE since 2016 and earned his Insurance Training Professional (ITP) designation in 2017.*





HEATHER BLEVINS  
CPCU, AIC, AINS, AIS, SCLA

State Farm

Change Management Analyst

## You Think Insurance is Boring?

Insurance has a bad rap as a profession. We inside the industry try to combat the stigmas of our wonderfully nerdy and exciting realm of serving the personal needs of the world's population. We help people. We are a people-orientated and focused industry. And we've done a pretty lousy job letting the world know what we offer and why we are important to their daily existence! We are a group of people who are dedicated to helping our customers achieve their dreams, recover from the worst disaster's life can create, and realize the untapped potential of protecting what is near and dear to their hearts. At the soul of the insurance industry, we are all about serving others and making personal connections in a very disconnected world.



Life would be very different if insurance did not exist. I would posture we could be living in a lawless, wild west, "Wyatt Earp" OK Corral twilight zone if insurance was not the backstop, safety net, and incredibly important thing it is to the world today. But the truth is, we in the industry have done a lackluster job selling what it is that we do, and we have made it difficult for us to attract and retain the next generation employee for our companies because of that. Let's face it, while the movie Tombstone glamorized the whole OK Corral life, I'm not sure most of us would enjoy living in that

world, despite how cool it was when Val Kilmer said, "I'm your Huckleberry."

### [I'm Your Huckleberry- Tombstone](#)

Most people when they think of insurance jobs see the bumpy - frumpy old dude insurance salesman, not unlike Ned Ryerson from the blockbuster hit *Groundhog Day*. Now while all of us inside the walls of our respective companies snicker at the humor provided by this character, we realize so many people get their "filters" about what it is that insurance professionals do from cinema and the media in general. Watch that first step, it's a DOOZY!

### [Ned Ryerson- Groundhog Day](#)

Think about how insurance companies are portrayed in films like *The Rainmaker*. While I ADORE this film, sheesh Hollywood, could you make us look any more evil? What is the first image YOU conjure if you are not in the industry about insurance professionals? Think back to the classic film *Double Indemnity*, or the lighter spoof *Cedar Rapids*, and even the kid's film *The Incredibles*. The dad in that film is an insurance adjuster with a HEART, but his job seems so mundane that no one would ever want to pursue a claims career!

***These movies provide funny and poignant looks into the life of insurance professionals, but they have their moments where all of us in the industry cringe at the message they send.***

What the world outside of our bubble in the insurance industry doesn't realize is that insurance companies are FILLED with amazing, incredibly challenging, and exciting job roles which will keep you learning, changing

and developing. You have choices within insurance career paths. It's not all insurance sales or claims or underwriting or actuarial roles. Although those jobs have their own distinct "coolness factors," if you believe that's all there is to our industry, then like that Judas Priest song goes, "you've got another thing coming!" The grooviest types of jobs in insurance companies may not actually deal with front-line insurance work. Here's just a few that come to mind. Change Management Consultants, Software Developers, Innovation and Research, Insurtech Architects, UX Engineers, Historical Archivists, Media Relations, Public Affairs Communicators, Learning and Development Designers- the list goes on and on. You can pretty much DO anything with an insurance industry career. The opportunities are almost endless.

- Insurance can be fun.
- Insurance is exciting.
- Insurance has MASSIVE diversity of choices in career options.
- Insurance can be for YOU!

And insurance is a lucrative career choice for those who pursue the right kind of education for a particular job skill set. Check out this website for more information on average insurance job salaries. Now while these are averages, insurance careers provide massive opportunities for salary potential!

### [Insurance Salaries](#)

People often make remarks and you hear frustrated sighs of irritation when you tell them you work in insurance. They may have had a bad experience with a homeowner's claim or an agent which has tainted their understanding of our amazing industry. Do we have issues with our image? Yes. We struggle with our image as an industry because we haven't told our stories well, and the negative attention we have received often becomes what people believe to be the reality about our entire industry. So I encourage all of us in the industry, **TELL YOUR INSURANCE STORY**. And those within the **insurance TRAINING industry** have unique opportunities to do just that! We make connections with others in ways that are powerful and meaningful.

This mover and shaker in the industry recently put a call out to us to do exactly that!

### [John Bachmann- Insurance Nerds](#)

People need to hear and understand how great this industry is to work in!

We are a family of nerdy, fun and awesome professionals dedicated to helping the world be a better place. What could be more rewarding than working at a place where you can do THAT every day?

Bad Wolf. 2012, July 11. *I'm Your Huckleberry Tombstone*. Retrieved from [https://www.youtube.com/watch?v=R8OWNspU\\_yE](https://www.youtube.com/watch?v=R8OWNspU_yE)

Movieclips. 2012, October 7. *Ned Ryerson! Groundhog Day (1/8) Movie CLIP (1993) HD*. Retrieved from [https://www.youtube.com/watch?v=XqSYC\\_vwhDg](https://www.youtube.com/watch?v=XqSYC_vwhDg)

[Heather Blevins](#) began her career in insurance with State Farm in 2004. She currently works as a Change Management 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 was recently elected to serve as the Vice-President of Marketing for SITE. On a personal note, she enjoys writing, college football and traveling the world.



# Board of Directors 2019 - 2020



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**Larry Nicholson**

Director, Underwriting and Training  
American Integrity Insurance  
Company

813-892-3779

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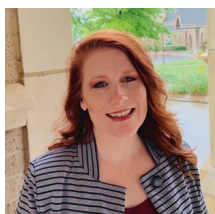
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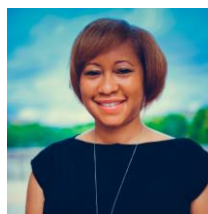
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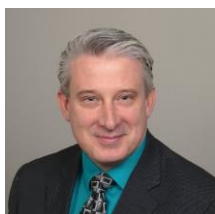
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**Evelyn Jorgensen, SCLA, AIC, ITP**

Learning Services Manager – Claims  
Selective Ins. Co. of America

973-948-1649

[e-mail Evelyn »](#)



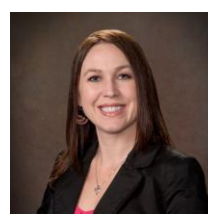
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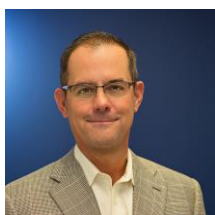
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## **Member-at-Large**

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## Upcoming Webinars & Events

*As a benefit to our members, we provide free monthly webinars to keep you up to date on training and education trends.*

### Webinar this Friday - Register Today!

**August 23** at 11:00 a.m. EST

["The Flipped Classroom for State Specific Training - Techniques and Tips"](#)

Presented by: Lydia Hayes - Senior Claims Trainer for Esurance

Employees need to learn about handling claims in new states, whether new to the company or promoted into a new role. Subject matter experts want to drill every last detail about that state directly into the learner's mind. The problem? Learning that is crammed with information and no on-the-job context.

In this webinar, we'll explore:

- Flipped classroom techniques that work
- Tips for successful set-up
- Ways to build participant buy-in

**Upcoming Webinars** - Visit our [webinar page](#) for upcoming registration information

September 20<sup>th</sup> – ***Workflow Learning***  
with Ray Jimenez, Vignettes Learning

October 18<sup>th</sup> – ***Creating a Learning Culture for Your Team or Organization***  
with Amy Waninger, Lead at Any Level LLC, and SITE Conference Keynote 2020

November 21<sup>st</sup> – ***Creating Effective Claims Scenarios to Teach Insurance Coverage***  
with Crystal Uebelher, Secura

December 20<sup>th</sup> – ***Explaining Insurance Using Common Terms***  
with Michael Constantine, The General

## Voices from Memphis

Here's just a few of your comments from the 2019 #SITEMemphis Conference!

### ***What was the highlight of the 2019 Conference for you?***

- The revamped program. I feel like this year's conference had a great program and had something for everyone. I really enjoyed talking to many of the first timers and hearing how much they were enjoying the conference and how they loved the program. One person said, "this conference was the exact thing I needed at the exact time."
- Networking with others in the same field when not in sessions.
- The Augmented Reality stood out for use of technology to improve application.
- ***The connections I made with other insurance educators***

The SITE conference this year in Memphis was exciting, dynamic and impactful. Make your plans to [Learn and Lead in the Big Easy](#) today! June 15-17, 2020 in New Orleans, LA. We can't wait to connect with you there!

## Why Train the Trainer?

Are 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 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 1.5-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. [Click here for more information.](#)

## Upcoming Train the Trainer Dates

### November 12 - 13, 2019

American Integrity Insurance Company  
5426 Bay Center Dr.  
Tampa, FL 33609

Suggested hotels in the area can be found [here](#).

#### [Online Registration - Train the Trainer - November 2019](#)

Registration Deadline: September 10, 2019 (Participation is limited to 15 attendees)

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### March 31 - April 1, 2020

National Interstate Insurance Company  
3250 Interstate Drive  
Richfield, OH 44286

Suggested hotels in the area can be found [here](#).

#### [Online Registration - Train the Trainer - March 2020](#)

Registration Deadline: February 3, 2020 (Participation is limited to 15 attendees)