InSITE

SITE
SOCIETY OF INSURANCE TRAINERS & EDUCATORS

February 2017

President's Message

Deborah Davenport

Got our Ducks in a Row in Memphis! The SITE Board of Directors just came back from a full two-day winter board meeting in Memphis. We stayed at the historic Peabody Hotel near Beale Street, home of rock and roll, the blues, and Elvis! The beautiful Peabody Hotel is known for the march of the ducks twice a day to swim in the lobby fountain. What fun for the ducks and their audience.

We were also busily getting our ducks in a row too. We had a productive meeting and are excited about some of our new initiatives. We have implemented many structural processes for SITE this year and now are focusing on adding value to membership.

Every decision the Board takes is based on the Mission Statement and Commitments.

The Society of Insurance Trainers and Educators exists to provide professional development to Society Members through programs, networking opportunities and services.

SITE is committed to:

- sharing knowledge and resources through collaboration with the insurance industry
- providing continuous learning and professional development
- supporting training and education as a process to achieve business results
- promoting professionalism and integrity

In This Issue:

To be able to accomplish adding value to membership, we are asking for your help. We are a volunteer organization and rely on member participation. Please consider joining a committee. We are looking for committee members for Strategy, Program Development, Resource Development, Service Development, Membership Drive & Retention, and more. Please feel free to reach out to me today to discuss how you may become involved.

We have our ducks in a row, but need some more ducks to help us march on to success!

Call me at 512-284-3901 or email ddavenport@germaniainsurance.com

Insanity = Policy Training

Sandra Jean Colley

How are your associates trained on coverage? Is it innovative? Is it interactive? Is the information retained?

I'm not one to place a bet (after all I work in insurance), but if I were, I'd venture to say the answer for most training organizations is a resounding no! Does this sound familiar for a typical policy learning activity: you gather your associates in a conference room and read the policy line by line from page 1 through the end? Somehow this verbal reading of hundreds of lines of text is supposed to be teaching our associates whether coverage exists.

Do trainers really believe associates are learning coverage this way? Maybe…but I doubt it. The reason most people conduct policy training this way is either:

- It's always been done this way (i.e. sponsors/ stakeholders want training done this way, as this is the way they were taught it and "it worked.")
- Trainers are not sure how else to train on the policy.

Albert Einstein defined insanity as: doing the same thing over and over again and expecting different results. Doesn't this sound exactly like policy training?

If you are looking to change your policy training, here are some suggestions:

- Avoid one-off training events – While it is usually easier to get associates for one full day versus multiple days, this strategy of a one-off event is not effective. Instead, try and hold smaller interval trainings over a longer period of time. This strategy helps fight the forgetting curve that we are all aware of.
- Chunk the training topics – We know that an adult's short term memory will allow them to understand approximately six "chunks" of information, which has the potential to move to their long term memory. Any more than this and learners can lose focus and become non-interested in the learning event.
- Make the training relevant to the job function – what is the purpose of the learning event? Is it to move through the policy from beginning to end and make sure each and every word is reviewed and discussed? If that is the case, then there shouldn't b*e* an expectation that the learners will retain the information. Adult learners learn best when a training event builds on existing knowledge and is immediately applicable to their job function.
- Incorporate scenarios into the training – A major characteristic of adult learners is that they learn best given scenarios versus being lectured to. Incorporate actual claims that the company has experienced and utilize those examples to reference back to important parts of the policy. This technique not only provides real world context, but it also gives adults the motivation to learn as this is a claim they may actually experience.
- Use a blended training approach – If you don't have the time to spread out the learning, another option is a blended approach. Prior to employees completing a live in person session, have them complete work online. This could include reading the policy and focusing on specific parts of the policy through interactive eLearning modules. Then when you have the associates on site for training you can dive deep into actual scenarios and whether coverage exists.

What other ways have you trained on policy? Share your great ideas with everyone on SITE's (Society of Insurance Trainers & Educators) LinkedIn page.

Looking to get published? Consider writing an article for our next InSITE publication. Topics for focus include:

eLearning training design ideas
for coverage training
Small Commercial
Life and Health
Personal Lines
Standard CL

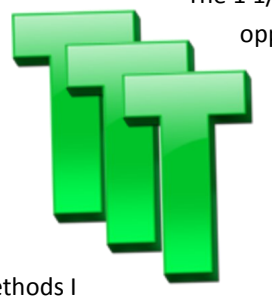
Submit your article to:
sitevpmarketing@insurancetrainers.org by April 18th

T4 – Try Train The Trainer

Dan'l Adams

A popular cereal commercial in the 1970's had the following line said from one young boy to another…"Try it, you'll like it." So what do you know? I tried it…and I liked it!

I was very fortunate coming into professional insurance training. I had 19 years as a claims adjuster, giving me practical subject matter experience in the insurance industry. I also had several years as a volunteer trainer, training scout leaders, along with 3 years, training young adults' religion in the early morning before they went to school. I also had the privilege of working 2 years as an adjunct professor at a small college.



I had the experience teaching adults…I even used adult education theory concepts in in the methods I used…I just didn't know it! I thought I was such the innovator.

SITE's Train The Trainer program was reintroduced prior to our conference in Portland a few years ago. I signed up for it. I was amazed at the information I was given. It is a blended learning format. The pre-workshop self-study was separated into bite size chunks of learning of just 10-20 minutes each. Where I would allow myself a ½ hour for study, I found I had completed 2 hours without difficulty because I enjoyed what I was learning! Concepts introduced and taught include sessions in:

- Adult Education Theory
- Analyzing the Need for Training
- Instructional Design
- Developing Instructional Materials and Activities
- Delivering Instruction
- Creating Meaningful Evaluations

The 1 1/2 day workshop was wonderful. It was an opportunity to discuss and share concepts (and experiences) with new trainers like myself. Three of those 8 who attended are now members on the SITE Board of Directors. Two have become primary instructors for the course. All have used this experience to improve on their training skills and several have received recognition and promotion in their careers.

If you are a fairly new trainer, this is a must course for you! As a member of SITE, you qualify for the discounted rate. You will gain practical knowledge needed to advance your career. You may even gain a friend or two. As the kid in the commercial said…"try it, you'll like it."

Register Today!

Dan'l Adams is Vice President of Membership Services for SITE and is one of the current instructors for the Train the Trainer program. He is the Chief Leadership Officer of his own company, Dan'l Adams Leadership Associates.

Blindfolds and Hot Wax in Claims Training

Jim Chaney

Hopefully I got your attention with that title. I first used those ingredients with an Xactimate class, but this technique can be adapted for other training applications where a skill is being developed. For those outside of property claims, Xactimate is software used to write repair estimates for damage to buildings. The idea first came up when we were conducting a two-week commercial property claims school. The class was primarily commercial property coverage training; it could get a little overwhelming and sometimes the students just needed a little something different. On Wednesday or Thursday of the first week, we normally had a one day Xactimate class that focused a lot on developing an accurate diagram of the building using the program's sketch feature. We also would have a theme for that day. The trainers would dress and decorate the room according to the theme, and we would gear some of the activities to the theme. The theme that year was pirates. This was between the first and second Pirates of the Caribbean movies and shortly before Halloween, so plenty of materials were available. So, what about the blindfolds and hot wax, you say? I'm getting to that.

The idea was that we would divide the class into four groups and each group would take a turn playing our game, "Walk the Plank." Group one would play at the end of the second hour, group two at the end of the forth hour and so on. The first step was to divide the outline into two-hour sections and identify the most important skills for the student to learn during that time period. There needed to be at least as many skills in each two-hour section as there would be students in each group. I then created the beginning of a sketch or estimate in Xactimate for each group, and listed steps to change the sketch or estimate using the skills identified as being the most important for that time period. Each step was drawn or printed on antique-looking paper, folded and sealed with wax, like an official order from the king. You have to be sure you have each order labeled in such a way that you can keep them straight without reopening them.

When it was a group's turn to play, they all stood up and moved to a corner of the room where they were blindfolded. This way they could hear what was going on, but could not see the screen. The first person on the team would be guided to a chair in front of the computer. The computer was open to the program's main menu. When told to start, the student would remove their blindfold, open their orders, and perform whatever task or tasks were on their orders. The trainer would also start the stopwatch. Everybody in the class could see the screen and would be allowed to offer suggestions. The student could choose which helpful suggestions to follow and which ones to ignore. When they felt that they had accurately performed their task(s), they yelled "ARRRGGGHHH!" If they could not do the task and wanted to give up, they yelled "Man overboard!" Either one would stop the timer. The trainer would then evaluate their performance. If done exactly right, five points would be awarded. If small mistakes were made, three points would be awarded. If they gave it a good try but were unable to do the task only one point was awarded. Then the next person in that group would play until everybody in that group had their turn at the computer. After the first person in the group played, each of the other members of that group built onto the previous player's work.

An example of how the first group might go is as follows: Player 1 orders – Open estimate "Pirate 1" and add a 10' X 10' room to the west side of the reception area (already drawn on the estimate). Label this room "break room." Player 2 orders – Add a 3' wide door to the north side of the break room and two 2" X 3" windows to the west side of the room. Each member of the team continues to build the diagram using a different tool. Once every group had played, an additional five points were awarded to the team with the best total time, and the second-best time received three points. This way, we were able to emphasize that both speed and accuracy were important, with accuracy being the most important.

This works very well with computer training because everybody who is not in the group playing can also participate by offering suggestions. If you were teaching Excel, this could

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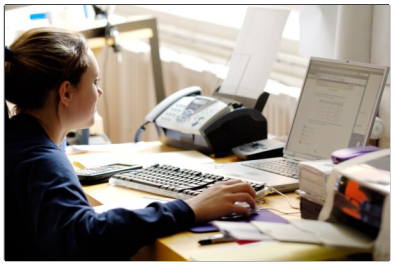
Sales Training for CSRs -

Six ways agency CSRs can be effective in selling in their agency

Richard Hart

In most agencies the CSR role is a pivotal component of their success. CSRs frequently have closer and more frequent relationships with clients than Producers do – traditionally through their handling of day-to-day service tasks. While all CSRs are involved in traditional Service responsibilities, the majority of them are also tasked with some Sales responsibilities as well.



In fact 61%* of Commercial Lines CSRs and 93%* of Personal Lines CSRs engage in Sales functions within their agencies.

With so many CSRs involved in selling, it is important that agencies focus on CSR training in the area of Sales & Selling. Here are six training and education topics CSRs and their managers/trainers can use to optimize their sales impact in an agency:

1. CSRs need to understand their role in the sales function of the agency.

Sales activities can run the gamut from simple appointment setting to active review of client needs, risks and exposures. Trainers and supervisors need to clearly define where CSRs will contribute to the Sales function. Some likely areas include:

- Appointment setting and phone/pro-active email communications to clients
- Policy coverage audits and review
- Cross-selling existing clients based upon coverage gaps
- Asking point-of-sale questions that lead to risk and needs discovery

2. CSRs need to maintain and enhance coverage mastery, service skills and confidence in their professional skills

CSRs are viewed by their customers as more than service help, they are "experts" in coverage, billing and process as well. They are regarded as insurance professionals by the state and are a part of the outward facing "professional image" of the agency. Trainers can help develop professional skills in CSR's by:

Building knowledge and skills through directing them to intentional development and training sources such as:

- Local professional associations
- Designation programs such as CISR, ACSR, AAI and others
- Carrier training programs and opportunities
- Focusing Continuing Education courses on those most useful to their role and professional development needs.

3. CSRs need training in how to conduct effective sales conversations.

Selling is a learned skill, and while some folks seem more gifted at it than others every CSR can learn the fundamentals of selling through service. Managers/trainers need to identify skill gaps and intentionally develop these skills in CSRs. These training topics can include:

- Training on identifying client risks and coverage need opportunities
- Telephone scripting and techniques focused on Sales/ Selling outcomes
- Training CSRs in dealing with objections and rejection
- Listening and communication skills

4. CSRs need guidance, mentoring and training investment by agency management.

Much has been written about agent/producer recruiting and training. While it is true that producers are vital to the health of an agency CSRs also need this focus from agency management. Over 65% of CSRs came into the Insurance industry by chance* and did not come with prior industry

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5 Tips to eliminate the 'UGH!' response to 'Let's Role Play'

Deborah Davenport

Well maybe not completely eliminate the 'UGH!', but at least minimize it. Face it, role playing for sales skills is rarely a popular activity. I want to share a few tips I've learned that have improved this section of my Life Insurance training.

1. Find out who likes Charades. I have the luxury of sending out a pre-class survey prior to Life training, but you can ask at the beginning of class too. Those who say yes are likely the ones who will shine at role playing and will usually help guide those who say they do not like charades. I pair those who say yes with those who say no.

2. Set up a comfort zone. When students arrive at the front door of our building, they are handed a card that has a cartoon about role playing on one side and the word 'inhibitions' on the other side. The students are told to leave their inhibitions at the door of the classroom. An envelope is taped to the classroom door that says 'Leave your inhibitions here'. The fun part is when a student still has the card in their hand and I have to ask if they 'left their inhibitions at the door'. It gets a groan and a chuckle, but does put the student at ease.

3. Put the students at ease upfront. At the beginning of class I immediately let the students know that they will not be role playing in front of the whole class. The activity will be done in pairs and groups. And the instructors will give guidance on an individual basis. This is followed by a HUGE sigh of relief. You know they are worried about it, so dispel the fear at the beginning.

4. Make it fun AND believable. The students are provided a random character to become when they are to be the client. This does take a bit of work on my part, but is worth it. I make up a client name and provide a data sheet about the client, including 'pictures'. The student is also given a name tag to wear during the role playing so their partner can visualize them as the client. My sales skills class is two days, so the students keep this same character the entire time. They 'buy in' and have fun with it, especially if they are playing someone opposite their own age.

5. Divide role playing into sections and give clear expectations. Each step of the sales process should be taught and then role played to ensure understood before going to the next. Be specific about the goals of the section and a stopping point in the sales process. This will give the student direction, keeps it from being overwhelming, and provides more confidence each time.

Bonus Tip: Practice with a Thumb Ball. I especially find this helpful for training 'Overcoming Objections'. Prior to role playing this section, we toss the thumb ball that has pre-printed objections on it. Wherever the thumb grasps, the student reads the objection and provides their learned response. This reinforces the lesson and makes role playing easier. (I purchased mine from www.trainerswarehouse.com)

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be used very effectively with each group creating or modifying a different spreadsheet, step-by-step. You, of course, do not have to incorporate the hot wax or blindfolds. One word of warning: Don't get carried away with the theme aspect. It is easy to get so creative that the theme becomes more of a distraction than a help.

If you are considering creating a game like this, please feel free to give me a call. I would love to help. It takes more time to set up than I initially expected, but it is time well spent.

Jim Chaney

214-693-1658

And the SITE 2017 Innovation Award goes to...

The SITE Board of Directors is now accepting applications for the Lois A. Markovich Innovation Award!

What is the Lois A. Markovich Innovation Award you ask?

More prestigious than the Oscars, the Lois A. Markovich Innovation Award recognizes the accomplishments of our members for new and innovative training programs as well as commitment to continued improvement through innovation.

Have your team's game changing ideas and work be recognized by your peers. Send in your application now!

Submissions should be limited to two pages in the format of your choice and must 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

If selected for this year's award, we require that you share the results of your initiative with SITE membership by either writing an article for our communications, conducting a concurrent session at the 2018 Annual Conference in Spokane, WA or present/participate in a SITE webinar during 2017. Please send your submissions to Brad Gutcher, Immediate Past President, at sitepastpresident@insurancetrainers.org by May 20, 2017.

Previous Winners of the Lois A. Markovich Innovation Award

2015 Nationwide
2014 "Levers!" (State Farm Insurance)
2013 Nautilus Insurance

Annual Conference Update

Heather Robertson

They say "everything's bigger in Texas"! Don't miss out on one of our biggest conferences yet! June 18th through June 20th, SITE will be taking over San Antonio, Texas!

We'll kick off the conference with an AMAZING keynote speaker, Lou Russell. During "Project Charter in 45 Minutes or Less" we'll discover the secret to project velocity—the project charter. Stop creating the project schedule before you know WHY the project is happening and its ROI. Lou will discuss how to establish the business objective and scope for project sponsor approval, how to identify the project objectives that define the metrics, and how to analyze risk, constraints, communication, and decision-making.

Our concurrent sessions are going to be GREAT! The finishing touches are being finalized for the entire conference agenda. We will release this soon for all to see how AMAZING our 2017 SITE Annual Conference will be.

The conference will close with an INCREDIBLE keynote speaker, Jan McInnis. We all know that change causes fear, tension and miscommunication. In this popular keynote, Jan will show you how to diffuse tension instantly, kick off tough conversations and facilitate communications through using humor. These practical tips, infused with plenty of Jan's humor, will have you walking away laughing and learning how to handle, and even embrace, change. And you'll also learn about the connection between humor and health through the latest research.

Don't miss out on early bird registration! Register today… you won't want to miss this event!

Deal Making

Paul Balbresky

I thought I would share just a couple of observations with you about soft skills training that you can apply in your organization. Whether you are working on sales training for agents, influence training for underwriters or negotiations for claims folks, the essential content is very much the same. I call my curriculum Deal Making because it crosses the technical boundaries of my various client groups and gives me a consistent and proven platform for delivering learning.

Obviously pulling learners away from work for any training is limited - so we use self-paced pre-work for foundation laying and workshop time for situation analysis, demonstration and skill mastery.

Pre-Work

Theory is provided as concise readings with questions to think about or application activities which we will review in class in lieu of extensive lecturing. We use on line self-assessments and student selected case studies as well. The assessments give feedback on communication, sales or leadership behaviors and are a methodology students enjoy. Case studies provide immediate application of concepts, a metric for how the learning improves results and an opportunity for managers to coach.

In Class

We often use competitions to provide an "aha moment" in an entertaining atmosphere. Often managers participate as observers and help with feedback during activities. Their

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Know your Audience!

Eric Fisher AINS, ITP

Sales people can be the most outgoing and outspoken people you will ever train. However, they can be easily distracted due to their need to be connected with clients at all times. It is easy for the room to get totally out of control if you are not careful. How do you deal with it?

A couple of weeks ago our training team had the opportunity to spend the day at our National Sales and Marketing Conference. Our job was to train all of our sales reps on an upcoming process relating to our new policy system. Training one to two is hard enough, let alone every company sales rep in the same room. We wanted to give them a training they had never experienced so we took some time to think about the most effective ways to engage and influence them. We came up with several activities and leveraged the use of competition and technology to our advantage. They walked in to the training room assuming it would be typical meeting day with death by Power Point. They had no idea what was coming.

The key word for the day: engage, engage, engage! We started with an icebreaker that got them laughing and set the tone for the day, followed by a game to review their current level of knowledge. The game we used required cell phones. People in training love being on their phones so why not leverage that? This game pitted them against one another and quickly became very competitive. At the end of the game the winner got a trophy.

Then we introduced a twist; there would be two more games like this throughout the day and the winners of each would have the opportunity to steal the trophy from the other person. Talk about being hooked and ready to learn! The day continued with activity after activity followed up with review and stealing of the trophy. We ended up finishing early for the day. Their high level of engagement helped mitigate getting off topic and sidebar conversations.

Since the conference, several sales reps said this was the

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Functional Areas are Intertwined

Larry Nicholson

Training functional areas such as Underwriting, Claims, Sales, and Customer Service all include a unique set of insurance professionals varying of different learning styles, skillsets, education and experience. I recently just finished an onboarding class which included participants of a variety of functional departments. At first, I thought to myself, how could I possibly do a true onboarding that included members from different departments but then I realized that they are all intertwined more so than I thought.

The lifecycle of any insurance policy may require participants from each group to handle. Sales is responsible for working with the agents to bind the new business policy, and then Underwriting reviews the risk for eligibility, Customer Service answers the policyholders' questions and assist with payments and then Claims adjust the loss in the event of a claims situation. With this said, each member from each department can benefit from training by actually learning what the other departments do and how they function. This helps to provide for more insight when each member is actually conducting their day to day jobs. For an example, part of the training for an Underwriter may be to review risk inspections, however there is a huge benefit for an employee from the Sales, Claims and Customer Care team to also be aware and understand what an underwriter may look for when reviewing an inspection report.

From a career path development perspective, participants may also benefit from this training method and may identify traits about each department that they might be interested in working at a future date. For an example, a Customer Care representative may have aspirations to one day work in Claims or Underwriting and this delivery method may assist in accomplishing that goal. In the insurance industry, it is seldom that participants from each department get a chance to learn about what other departments do and to also observe the level of work that is required within each functional team.

When I conducted this method of training, it was very well received from each participant. Participants felt that they had a much better understanding of how the company operated and how each department works together and are all part of the policy life cycle. The key here is that the grave details of a specific area of training might need to be saved for the actual OJT. Too much detail on a particular functional topic might confuse or cause a loss of interest to the other department participants. For an example, showing all the participants how to adjust a claim using the claims adjustment software would need to be saved for the OJT. This method of training is meant to be as general as possible but still hitting on key focus areas of each department.

In conclusion, the sharing of experiences and asking for feedback encourages an interactive dialogue among all of the participants and certainly helps to provide a much better training experience for all department participants. Before delivering this method of training you may first want to speak with the respective heads of each department and get their input and/or buy-in first. However in my experience, managers are typically open to the sharing of information to all individuals in training and within the company.

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engagement shows learners this is important material and helps managers understand where they need to reinforce and coach after the class. Finally we create Action Plans for the Case Studies and use a multi-tiered approach to coaching to sustain results.

Soft skill classes are an important part of a learner's development and by varying your instructional design you can help grow your bottom line results!

For more information, feel free to contact Paul Balbresky, ITP pbalbresky@verizon.net

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skills or knowledge. In other words, they entered our industry because they needed employment. Given this it is far too easy to forget their professional development after they become deeply involved in their service roles. Trainers can help improve overall CSR skills by developing:

- Have development plans for CSRs. Training & development plans and Intentional skill building events can focus the CSR on targeted new skills and knowledge as a regular component of their job.
- Share a mutual un understanding of the CSR Career path – and the career options for growth
- Management responsibility and accountability for training & development, mentoring and encouragement of the CSR role.

5. CSRs need to be removed from sales quotas and typical selling "pressure" but still benefit from a focus on results:

One distinctive of producers vs CSRs is in the pressure to sell and being compensated by commission from those sales. CSRs are not commissioned salespeople, but their sales effectiveness can be improved through a focus on sales results. These can include:

- Activity goals and targets – Trainers can help management define success for the CSR role outside of raw sales and premium.
- Development of sales incentives (monetary and non-monetary) to reward positive selling behaviors

6. CSRs need to make selling activities and sales training a routine part of the job, not a rare exception

Time management is often a challenge for CSRs as a multitude of service and work items often compels CSR sales training and selling activities to take second place. CSRs and agency leaders need to intentionally devote time and resources on CSR sales training and sales activities through:

- Intentional and planned sales activities a regular part of the work week
- Scheduled sales training, practice and mentorship occurring in a planned and purposeful manner.

CSRs are already involved in "Selling" in many agencies, but an active and focused training emphasis by agency management can help optimize how CSRs contribute and assist CSRs in developing their skills and career. This training focus can help both the CSR and agency leadership in developing the selling skills of the CSR. Sales skills and knowledge are perishable and are often gained and maintained through intentional focus on training and activity. Trainers can help make good CSRs in to great selling CSRs.

*source: CSR Profile - The National Alliance Research Academy

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best training they had experienced. One individual even told me point blank she was dreading our session but was extremely thankful she attended. Our training was talked about for the remainder of the conference and we have a great example of how to approach sales going forward.

There were two main lessons from this experience:

Know your audience - develop training tactics that make it personal to them. If it's exciting for them, they pay attention.

Take risks and try something new - we had never stacked activities back to back for an all-day training, but ultimately this method kept everyone engaged and ready to learn.

Eric Fisher is a Training Specialist for American Modern Insurance Group.

The opinions expressed in this article are the author's own and do not reflect the view of American Modern Insurance Group, Inc. or its affiliates.

Regional News

Eastern Region Report

Evelyn Jorgensen

Welcome to 2017….the year of change! We've certainly seen – or will see - change in this country and in the world throughout 2017. SITE is changing too! Our Board of Directors is working hard to grow our membership (additional members = a large resource pool for you to tap into), provide additional value to our members through an improved InSITE – featuring focused articles on specific topics, review options for an advanced ITP (Insurance Training Professional) designation and more. We also plan to share articles on our SITE LinkedIn group (you're not a member?? – Go to LinkedIn Groups and search for Society of Insurance Trainers and Educators to join!). We are also looking to expand our SITE Huddles to all of our membership that will give us more collaboration and discussion.

Speaking of Huddles, we hope you were able to join Brandon Huff in our December 2016 SITE Virtual Huddle on Evaluating Training. There was some very good discussion and Brandon was kind enough to share a resource on a Blended Evaluation tool that he uses. As an Eastern Region SITE member, you would have received this as well as a Huddle Quick Card summarizing some of the key takeaways from this session. Reach out to me if you need another copy sitervpeastern@insurancetrainers.org

You'll also see additional opportunities to get involved in SITE – by writing articles, hosting huddles, presenting at webinars, workshops or at our annual conference (San Antonio, here we come!). You'll also see additional opportunties to serve on committees. Just looking to get your feet wet in volunteerism? Think about being a state director for the region, or hosting a SITE social in your area. **TOGETHER** we work to provide value to others while we gain the benefits of personal and professional growth.

Southern Region Report

Sherry Moor

I am sitting in my office here in St. Petersburg, FL looking forward to wearing a sweater for the first time this year. Florida has finally decided to participate in winter…for a couple of days anyhow. There are all kinds of great things happening here in our region. We have a Train the Trainer class being held here in St. Petersburg on 2/22 and 2/23. I am taking part in the class this time and I'm really excited to put my knowledge to the test and learn from my peers. If you have not taken SITE's Train the Trainer class yet, you still have time to sign up for the June session which will take place right before the annual conference. One of the things I'm really excited about is that after completing the Train the Trainer class all of us will then be able to apply for the ITP (Insurance Training Professional) designation. This is an exclusive SITE member benefit. Plus, who doesn't want some extra initials on their business card, right? In addition to the TTT, the southern region will be hosting the 2017 annual conference in beautiful San Antonio, TX. The Westin Hotel, where the conference will be held, is right on the Riverwalk, and it is gorgeous! We have a lot of fantastic speakers and sessions to teach and inspire, and we have several networking opportunities where you can meet new friends and catch up with friends you haven't seen since the last conference. We will also have a southern region meeting at the conference where you can get to know your southern peeps and let me know what SITE can do to make your membership even better.

SITE is a volunteer organization and I have had several of you reach out to me recently to find out about how you can get involved. Here are a few of the many options that you can do to get involved: host a social, host a training event, host a virtual huddle, write an article in InSITE, become a regional director, volunteer at the conference, and even be on the board. The more you put into SITE the more you will get out of it. I have truly enjoyed being a part of this

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organization and I am honored to have the opportunity to represent the southern region as your VP again this year. I hope to see everyone in San Antonio in June.

Western Region Report

Helen Gomez

2017 is flying by. Before you know it will be time to see each other at conference! So I want to ask for your help to connect before conference. I would love to get to know you and I know others would like to get to know you a well. I'm looking for volunteers to host either a virtual networking gathering and or a gathering at a local restaurant. Let's connect before conference! Please send me an email or give me a call.

I have some exciting news to share….Train The Trainer is coming to California! Please save the date September 20 & 21, 2017. Liberty Mutual will be hosting the training at my home office in Aliso Viejo, CA. More details will be available on our SITE website.

Hope you are having a great year and I look forward to connecting soon!

Central Region Report

Kate Manthey

Unfortunately, I don't have a lot to report at this time. We had a very well-attended Train the Trainer session early in November, and I hope all of the participants will share their experiences with their colleagues. Many of us land roles in training because we are so familiar with the products and services that our companies offer, not because we understand the learning process and what it's like to teach to other adults! The next Train the Trainer session will be is in two weeks in St. Petersburg, Florida – I'll bet that sounds pretty nice to many of my Central Region friends right now! The next session will be held in San Antonio, TX in June, right before the SITE Annual Conference! Talk about bang for your training buck – travel once to learn the basics of training & development before networking with your colleagues at the annual conference to give your new knowledge even more context!

We are also working to make sure that you get SITE value for your membership. The website is constantly being enhanced and updated with the latest events and opportunities. If you haven't been to the website (www.insurancetrainers.org) for a while, please update your member profile. We are also working on our member database and providing better search functionality to allow you to find other members in your area and/or with the expertise you're looking for. What else would you like to have available on the website? Most of us are on the move quite a bit, so the website is critical to finding what you need, outside of the annual conference.

It would be nice to have some get-togethers within our region, but let's be honest: many of us right now are dealing with bitterly cold weather and/or raining ice and/or blizzards. Travel is not that convenient for many of us…so how about a virtual SITE Social? While I truly enjoy getting together in person (don't want to discourage that!), If anyone is willing to coordinate a virtual meeting, it would be fantastic! Do you have a burning question that you'd like to bounce around with your peers? Do you have the ability to set up a webinar or even a conference call? Let's talk!! Send me a note at mantheyk@uwosh.edu with your contact information, and we can set up some time to talk.

One last thing for now – SITE Webinars. Each month, SITE produces an hour-long webinar on a different topic. If you have ideas of a topic you'd like presented in this format, let us know. If you have something that worked really well for you and you want to share it with others, let us know. We are always looking for new ideas and new presentations. SITE is committed to helping each of us build talent within our organizations; please share what you know with your SITE friends!

Stay warm, stay safe, and hope to connect again soon!

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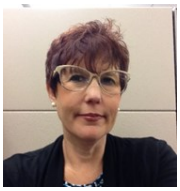

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