

November 2016

President's Message

Deborah Davenport



I just spent the weekend with my youngest granddaughter and received a 'lesson' on raising babies in the year 2016 from my daughter. Apparently I'm lucky my daughter lived since I did everything 'wrong' back in the 80s. New research says the baby cannot sleep on her tummy, have a blanket in her crib, doesn't have to be 'prompted' to burp, no rice

cereal mixed with her milk, no teething biscuits until eating solids.....the list goes on.

So it is with training too. We assume that training in 2016 shouldn't be any different than in the 80s. We now rely on new research about how we learn.....brain science. The results have made us train differently. The Learning Trends for 2016 were about utilizing more Technology (eLearning, Videos), Gamification, and Bite-Size Learning. The Learning Trends for 2017 are similar: Immersive 3D Learning, Bite-Size Learning, Gamification, Enterprise Learning, and Mobile Learning. I am proud to say that SITE embraces these trends when developing our annual conference program and monthly webinars.

Speaking of the annual conference, we are still accepting concurrent session speaker proposals for the 2017 Annual Conference in San Antonio, TX. If you have expertise in any of these topics, please go to www.insurancetrainers.org to complete a speaker application or contact Kate Manthey at mantheyk@uwosh.edu if you have questions. We're also accepting webinar session presenters for 2017! Please contact Sandy Masters at sandra@prepademy.com to share your knowledge. Our members are our greatest resource. Volunteer today!

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One last thing.....I wanted to talk to you about the 2017 trend of 'Enterprise Learning'. There is a focus of organizations to develop training strategy that meets the OVERALL objectives and mission of the organization. Suma Elwell presented a concurrent session in Minneapolis during the 2016 Annual Conference on 'Appreciative Inquiry'. This is a methodology that assists organizations with strategy by utilizing positive experiences. Recently your SITE Board of Directors met in San Antonio for a regular in-person board meeting. We also spent a good amount of time working on strategy for SITE. We utilized Appreciative Inquiry and are especially excited that we were able to utilize something we learned from an Annual Conference session. Again, our members are our greatest resource!

I want to encourage you to get involved in SITE, take advantage of networking opportunities in your Region, attend SITE webinars, AND REGISTER FOR THE 2017 ANNUAL CONFERENCE for new Learning Trends sessions! You may need to use up some 2016 budget dollars before the end of this year....now is the time to do that!

Decision 2017

Brad Gutcher

Regardless of how you feel about the National Election of 2016, one thing is consistent. SITE's continuing pledge to provide professional development to our members. One way that we accomplish this mission is by serving on the Board of Directors.

Each year we elect a new Board of Directors at the Annual Conference. 2017's conference will be held in San Antonio

at the Westin on the Riverwalk. It is my responsibility as Immediate Past President to solicit applications from our members. I urge each of you to seriously consider becoming a board member. Regardless of the position you hold, it provides you

with a development opportunity that you may never be given anywhere else. You will learn more about SITE and be able to proudly list the board position on your resume.

Open positions that we are seeking applications for are:

- President – Term limits have a place in our society and Deb must step down as President. The Presidents sets the vision for the society for the 1-year term. It is an exciting, fast paced position that is very rewarding.
- VP Member Services - Primarily responsible for driving membership, this position also leads the Regional Vice Presidents
- VP Annual Conference – Do you like a challenge? This position will give you that and more! This individual is as you might expect, responsible for the planning, organizing and implementing the 2018 Annual Conference in Spokane Washington!
- VP Marketing – This position is vital for SITE in getting the word out about functions, webinars, and TTT sessions. It is a great opportunity for someone who is

very savvy in social media and writing in general.

- Secretary – This individual ensures that all board meetings are documented accurately along with procedural guides and our by-laws.
- Treasurer – This individual works closely with our Association Management Company partner to ensure that all financial records of the Society are maintained.
- Regional Vice President - two of our Regional Vice President positions are open. This year it the Eastern

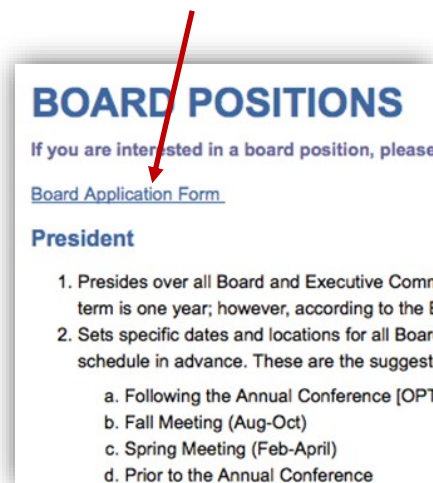
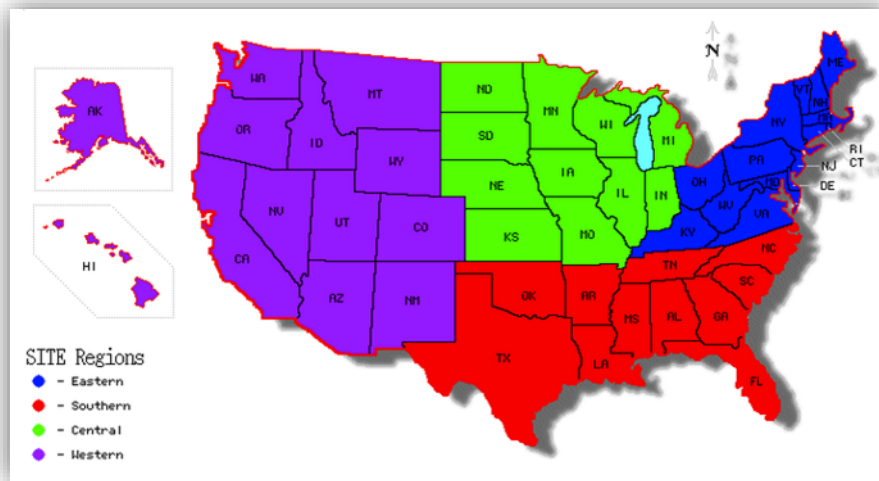
and Western regions. If you live in one of these regions (see map) and are interested in driving membership, regional activities and becoming more involved in SITE, please apply. NOTE: Regional VPs hold a 2-year term.

Please use this link

<https://site.memberclicks.net/board-positions> to see more detailed descriptions of the

board positions. If you have questions, please contact me, Brad Gutcher at brad.gutcher@i-car.com or 224-800-9301.

To apply, click on the Board Application Form link from the Board Position page at the above url.



How do you eat an elephant? One bite at a time!

Kate Manthey – Central Region VP

We've heard this before. To do the work that we do, we have to break it down into manageable parts.

So why don't we do this for our learners?



One of the emerging trends in learning is creating learning events that are very small, concise and immediately usable when needed, commonly called bite-sized learning.

Historically, learning has been built in time increments. Programs are built to cover an hour, a day, a week or even more. Many onboarding programs go on for weeks and are built around a cohort of employees learning the same new information at relatively the same pace.

There's nothing wrong with this approach... as long as we're not simply building a big data dump of information that the learner must sort through to use efficiently.

Now, you might be thinking that your new recruits need to know all of this information and know it well to do their jobs. Much of our training is based around insurance coverage and contract language, which is not the easiest to work with. There must be a better way to learn than spending hours analyzing coverage forms!

Consider this:

- A typical goldfish have a 9 second attention span – don't ask me how they measure this!
- A typical human has an 8 second attention span.

My sister-in-law has an even better way of stating the facts. She's Tulsa born and raised, so she says it with her cute accent: 'Most people have the attention span of a baby gnat.' She makes me laugh every time it comes up in conversation!

When we measure the effectiveness of our learning, is it based on how much we can cram into an hour of class time together, or is it based in creating learning activities that quickly reinforce the important points they need to know to complete their own learning loop?

Bite-sized learning is really about a different way of thinking more than anything else. In longer training sessions, typically several learning objectives are covered in the allotted time. With bite-sized learning, each learning objective becomes its own mini-course. The learning activities become staccato bullet points that immediately get to the point. Any existing course can be converted into a bite-sized learning module, and there are some real advantages to doing this:

- Modules are shorter and easier to put together; it may not seem as cumbersome as developing a 'program'
- The Millennial generation (and actually, most all of us) now expect information on demand; we don't want to have to hunt too long for the information that we need
- Learners tend to tune out after about 10 minutes; bite-sized learning lasts only a few minutes
- Learners can tune in whenever they have a few minutes to spare
- Learners can easily access information that is properly organized at the moment they need it
- Learners can skip modules that do not apply to them (or modules they've already mastered), which means they can customize their learning experience
- Modules are easier to update; no need to revamp the entire program
- Modules are more readily adaptable to mobile learning, another trend that is on the rise
- By mixing up how each module is developed, you have a more engaging collection of topic-centered learning activities versus one long, monotonous presentation

It is even easier to incorporate video in these shorter modules, versus creating and editing a 'production' video for a longer course.

Sometimes learning programs are based on the 'Sage on Stage' approach. Let's face it – if we're in a pinch, it's probably the easiest approach to just stand in front of the room and unload information. It takes a little more effort to rethink a program into its component parts, but as you can see, the benefits make it worth the investment.

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Learning Experience versus Instructional Design

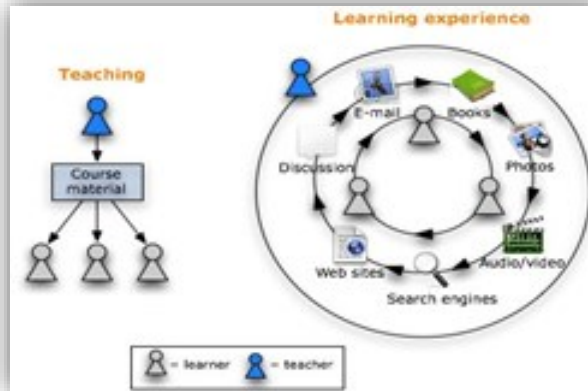
Elise Quadrozzi – SITE Marketing VP

There has been a lot of discussion over the last couple of years about Learning Experience Design. In practical terms, how do we take this new phrase and put it into practice in our organizations?

Simply put, Learning Experience Design means that rather than focusing on the course, the focus is on the entire learner experience. We need to determine how the information can be conveyed in a way that makes the most logical, intuitive sense to the learner. Learning Experience Design moves the focus away from instruction to learning. As the visual illustrates, it can help to understand that learning can take place anywhere and not just in a formal classroom.

So what are some ways to move to a Learning Experience model of design? First, before you start building anything, you need to understand the problem you are trying to solve. Once you have a deep understanding of the problem, focus on identifying the gaps that exist between the learner and his or her desired outcome and also understanding why those gaps exist. Is it a lack of knowledge, skill, confidence, motivation or resources and tools? Once you understand the gaps and why they exist, it makes the most sense to work backwards from the desired future state.

Start by asking what do you want the learner to be able to do? What is the outcome of them being able to master this skill? What tools and resources will they need? Asking these questions will enable you to determine how your content should be structured in the most effective way to achieve the learning objectives. Once you have your content outlined, begin to think about the best way to teach it. Should the content be delivered online, virtually, on location, or in a classroom? Selecting the right learning method is critical to the outcome. For example, my company, I-CAR, has a welding certification program. Critical to the success of learning how to weld properly is being trained on the equipment the technician will use every day in repairing automobiles. This skill would not be appropriate to teach online as it is hands on. It would also not be appropriate to teach virtually or in a classroom setting for the same reason. It should be taught on



location where the technician can learn and practice on the equipment they use daily.

Also think about what preparation the learner might need for a successful outcome. Perhaps there should be pre-requisites either in the form of advance reading material, research or a foundational course that would bring the learner to the topic more prepared.

Learning Experience Design is a complex topic. Hopefully the fundamental tips above will spur you to think about how you can create a “user experience” rather than simply designing a course.

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Once your library of modules is developed, updates and maintenance become much more manageable. Not every module has to be perfect the first time around; as you develop a better way to approach that learning objective, you simply replace that module. When there is a new news story or a claim rolls in that perfectly explains the learning objective, you can easily replace that module. Nice!

The classes I teach at UW Oshkosh are either 60 minutes or 90 minutes long; the university dictates how long our class periods are. But I am challenging myself to break the class into several bite-sized pieces that will more quickly tackle each of the learning objectives while also being more engaging for my class. Yes, I do have the power to put students to sleep with a boring lecture!

So that is the challenge I set for myself; how will you tackle bite-sized learning for your organization? Just to reiterate why bite-sized learning makes a lot of sense: What’s the attention span of a goldfish?

- 8 seconds
- 9 seconds
- Something about a baby gnat

What was the question? You might as well get going on that elephant.....

Member Services Report

Dan'l Adams

Welcome to the family!

You are the best at what you do! So much so, that your company has asked you to train others to be more like you! Congratulations! *What do you do now?*

You are an experienced insurance professional (claims adjuster, underwriter, agent, manager etc.). Now, however, you have been asked to do something you have never done before...to train others! You're scared to death!

This was where I was just a few short years ago. Sure, I had done some volunteer training...at church, scouts, and community organizations. I had even been an adjunct professor at a small college for awhile.

But now I had been hired to be a *professional* trainer by my company. Who was going to train me? The company? Are you kidding? My new manager? Not by a long shot. The other trainers I worked with? "I would love to help you...if you are ever in my region and I can spare some time...you know I'm just swamped." You get the idea.

One month after "going pro" I attended my first SITE conference. I attended some wonderful training. Of most value were the members that I met...or I should say met me. They were positive folks...they were proactive folks...they were the salt of the earth, would give you the shirt off their back, share their last meal and give you their last dime kind of folks. I found not only mentors...but friends.

Over the years these friends have helped to mold me into the trainer I am today. Because of them, I tried new and different ways of doing things. Because of them, I tried new styles and methods and volunteered to take on challenges I would never have done on my own or at my company (because face it...you fail at your work, it will show up on your review!).

Here I received recognition for not only the effort but for a job well done. Constructive comments (vs. *constructive*

criticism) were made for my benefit. These new friends shared in my accomplishments and were genuinely happy *for me* when I succeeded.

One of the things that was most beneficial to me was taking the Train the Trainer workshop. This is a wonderful, blended, learning experience. Co-produced with The Institutes and SITE, a new trainer is introduced to and learns practical insights such as adult learning theory, gap analysis, proper objective writing, evaluations, training styles and delivery...and so much more!

All of this concludes with a 1 ½ day workshop where, in a safe environment, you share and discuss ideas with your peers from across the country...and yes, you make a short presentation in front of them, to put into practice what you have learned.

Once completed, you are well on your way of earning the distinguished Insurance Training Professional (ITP) designation. Some companies have recognized the quality and benefit of this program and are now asking SITE to offer exclusive training at their own venues.

I encourage you, and invite you, to sign up for a Train the Trainer (TTT) session next year. The next session will be held in Florida in February (applications are available on the SITE website now), as well as one in San Antonio next June (just 2 days before our annual conference), and another TTT is scheduled for September in Southern California.

In a few short years, I have delivered a couple of national webinars, written a few articles, given a few trainings to my peers, and now serve on the board of a National Training Organization...because new friends believed in me! Heck, I even wrote a book about training based on my first training session I did at a SITE conference.

What learning trend do I encourage you to learn more about? Talk with your peers, associate with other trainers, and work on your own development. At SITE, you have a family and a home where you can hone your talents and skills in an environment that is positive, safe, and fun!

We're glad you're part of our family and want to celebrate with you as you progress and succeed.

Welcome New Members!

<u>Name</u>	<u>Company</u>	<u>Region</u>
Becky Barth	PSA Insurance	Central
Austin Beigel	Society Insurance	Central
Debora Ruth Colbert	State Farm Insurance	Western
Susan Daigle	United Insurance	Eastern
Cari Garms	Allstate Insurance	Central
Michael Gay	Volvo Financial Services	Southern
Amy Hart	Hart Training Connection	Southern
Allen Messer	Insurance Concepts & Services	Southern
Jennifer Munro	Munro Consulting LLC	Western
Lizzie Nauranga	AmWINS Group Inc	Eastern
Anne Ore	Liberty Mutual	Central
Donna Szuch	Great American Insurance	Eastern
Crystal Uebelher	SECURA Insurance Company	Central

SITE Members: Feel free to reach out to your Regional VP with any questions about how to get the most out of your SITE Membership!

Central Regional VP: Kate Manthey- mantheyk@uwosh.edu

Eastern Regional VP: Evelyn Jorgensen- sitervpeastern@insurancetrainers.org

Southern Regional VP: Sherry Moor- sitervpsouthern@insurancetrainers.org

Western Regional VP: Helen Gomez- sitervpwestern@insurancetrainers.org

VP Member Services: Dan'I Adams- danl_adams@yahoo.com



Save the Date!

Join us in San Antonio for another exciting SITE Annual Conference!

**June 17-21, 2017
The Westin Riverwalk**

Regional News

Eastern Region Report

Evelyn Jorgensen

Eastern Region SITE BYTES

When I think about training trends, I think about how learning and development has changed over the years. I started as a claims trainee (many, MANY years ago). At that time, training meant sitting in a classroom listening to a long lecture style presentation, sometimes with overheads (some of you may remember overheads!)...or reading volumes of material in a binder that was provided to me. If someone was cutting edge, they provided a slide show and used flip charts! Then came PowerPoint (exciting animations and transitions!)... and DEATH BY POWERPOINT. Then, training moved so that learners could participate virtually. And now, learners can bring learning with them, participating wherever they are and whenever they want. I was recently asked about assisting with drone training for some of our property claims adjusters. Mobile learning, virtual learning, 3-d learning... What an exciting time to be in the learning and development field! As technology grows and changes, it has a tremendous impact on learning opportunities. What opportunities have you taken advantage of?

In our SITE Eastern Region, we've started our Virtual Huddles. If you haven't participated yet, it's a great opportunity to contribute and learn from your peers. Rather than a webinar training type of session, the huddle host facilitates a session on a specific topic in which everyone contributes their questions, ideas, and best practices. Our next session will be on December 15 on the topic of **evaluations**, conducted by Brandon Huff. Stay tuned for more information! In addition, we'll share a Virtual Huddle quick card with our entire region.

We hope that you were able to join Carrie Kopp and other Eastern Region SITE members at the recent SITE social in Richmond, VA. If you know of an upcoming insurance related event that other SITE members might attend and would like to host a social, reach out to me at sitervpeastern@insurancetrainers.org.

As we head into fall and the approaching holidays (more quickly ever year it seems!), I am always awed by the giving and sharing of so many volunteers, in so many ways. Whether it's collecting coats or toys, donating food to a food bank, or giving time to create shelters (human and animal), the giving spirit of Americans is something that makes this country so great. Did you know that SITE relies almost entirely on volunteers to provide you with all of the great benefit you receive?

As a volunteer, not only do you contribute to the benefit of all SITE members, but it also benefits you personally. Volunteering on a committee, as a regional state director or as a SITE board member, provides you with opportunities to build leadership skills, gain additional skills such as strategic thinking, planning and decision making that you may not gain in your current role. Volunteering to write an article, present a webinar or a session at a conference, or host a huddle offers opportunities to practice and stretch in directions that you may not be currently afforded. It's truly been an extremely rewarding experience for me... I highly recommend it!

Southern Region Report

Sherry Moor

Hello Southern Region:

As I write this article we are about to get a cold front moving in to Florida which will bring our evening temperatures to the upper 50's and low 60's. Brrrrr...! better go find my one pair of warm socks! While the air is cooling off, if your offices are anything like mine, the work is heating up. We are scrambling around trying to find the time to get those last minute projects completed before the holidays and vacation season.

While it can be easy to crank out a training program the way we have always done it, now is the time to think about new ways to get and keep our learners engaged. I have been using gamification in live training for years. If you attended

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Regional News

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my panel session with Kate Manthey and Sandy Masters at the Colorado Springs conference, you learned all about how I use Polleverywhere and Kahoot in my live training sessions.

However, I have been thinking more and more about how we can use gamification in our online and virtual learning. Gamification is defined as: the application of typical elements of game playing (e.g. point scoring, competition with others, rules of play) to other areas of activity, typically as an online marketing technique to encourage engagement with a product or service.

Gamification is exciting because it promises to make the hard stuff fun! I have seen some pretty amazing apps out there for education and I just know that we “the insurance training professionals” can come up with something similar to get our agents excited about learning. Some of the apps that I am using right now are: Duolingo – I’m trying to learn Spanish; MindSnacks – another language application; MyFitnessPal – to help me learn what I should and should not be eating (why is wine not a food group?); and C25K – helping me learn how to run (which I so far hate).

That is just a small snippet of what is on my cell phone to help me learn things whenever I want. What do you use? How can we come up with a fun app to help agents learn more about insurance? I’d love to hear your ideas.

Western Region Report

Helen Gomez

Hello Western Region!

I am so excited to share with you one of the hottest trends in corporate learning..... Mobile Learning.

Incredible to believe.....THERE ARE MORE MOBILE DEVICES THAN PEOPLE ON EARTH!

So no business is complete without a mobile app version of their website. Users are looking at mobile phones for all their computing needs. If your eLearning program is

incompatible with mobile devices, you very well might be rendered out of the industry this year! In regards to mobile learning, 99% of mobile learners believe the mobile format enhanced their learning. Eighty-eight percent of all employees use their smart phones at work. Experts are predicting a heavier inclination towards mobile apps and mobile computing experiences in the upcoming years. mLearning literally places knowledge and information in the palm of the user, regardless of the place and time. This power is becoming easier to develop and even easier to achieve. The new motto BYOD...Bring Your Own Device!

According to learning trends, by 2017, 90% of corporate organizations will support some form of BYOD. Hence, it is clear that the future of BYOD is bright. Through the BYOD policy, organizations permit their employees to carry their own devices such as laptops, smart phones, and tablets to work. This sets the stage for online training in a cost-effective manner as the companies need not provide devices to their employees. This policy works well, specifically for organizations with a global workforce, since equipping them with a gadget is a costly affair. Another advantage of BYOD is that employees learn better as training is delivered on their personal devices with which they are comfortable.

Though BYOD seems to be a promising mobile learning trend, it’s not immune from risks such as data leakages, malware infections, security breaches, etc.

Organizations need to ensure the devices used by their employees are secure and that company data is protected. They need to check whether their infrastructure is framed to handle workforce mobility. They can enforce the acceptable use of policies and procedures to keep data secure. These policies and procedures should be clearly and explicitly conveyed to employees, along with the consequences they may face if they violate those boundaries.

I would love to hear from you how your company uses mobile learning for training.

helen.gomez@libertymutual.com

Regional News

Central Region Report

Kate Manthey

In my last article, I asked your thoughts about collaborating as a region, and suggested different ways that SITE members could more fully engage with others in the organization. I also asked for any comments or items to share with others, to which I received only one response. This tells me one of two things:

- No one has any ideas
- No one wants to share
- No one reads InSITE

I am going to assume that the 3rd reason is the case. After all, we are all very busy people!

So I will keep this short.

I would love to get a couple of workshops/socials on the calendar. I even know who I would ask for help! But honestly, there's not time for that right now.

Right now, I am working on a great lineup for the next SITE Annual Conference. So if you would like to coordinate a meeting in the Central region, I am all for it. Send me your idea (mantheyk@uwosh.edu). We can bat around the details and get it on the calendar. I am happy to help make the workshop/social a reality, but I'm really looking for a member to coordinate that effort.

In the meantime, this is what I really need.

Would you, or someone you work with, like to share their expertise with other SITE members?

If so, please submit a proposal for the SITE 2017 conference in San Antonio. Believe it or not, our Annual Conference exists to allow members to share their expertise with others. Members who share ideas demonstrate the true power of SITE. Here are some ideas of what we need to round out our conference schedule:

- Does your organization have a successful onboarding

program? Tell us about it!

- Do you conduct very technical insurance training? What works and what doesn't?
- How do you measure the success of your programs? We'd love to hear about it!

You get the gist. Please consider sharing your experience with the rest of your SITE peers. There is an online form for your proposal; if you have any questions, please let me know!

And, if you'd like to do a preview of your session before presenting it at the Annual Conference, I'm pretty sure we could build a regional workshop/social for your proving grounds!

On November 2, sixteen insurance trainers will meet on the Allstate campus to complete the Train the Trainer (TTT) program. During their two days together, they will collaboratively review what they've learned during the course and improve their work projects through peer review. There's also time to network and share ideas with other participants.

The SITE TTT is a great program that ties our world of insurance to adult learning theory; talk with anyone who's completed the program!

Congratulations to our Train the Trainer class of November 2016, and a big thanks to Allstate for hosting!

Train the Trainer November, 2016 in Chicago



2016 - 2017 Board of Directors



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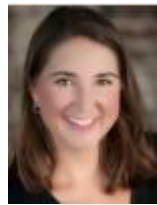
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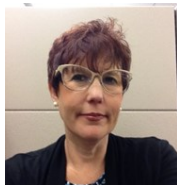
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