

InSITE

SPRING NEWSLETTER



JUNE 24 - 26, 2019

THE PEABODY MEMPHIS *Memphis, Tennessee*
Register at www.insurancetrainers.org



KEYNOTE SPEAKERS



**Brian Ahearn, CPCU,
CTM, CMCT**
Influence PEOPLE



Jim Kirkpatrick, Ph.D.
Kirkpatrick Partners



Photo credit: The Peabody Memphis

Inside this issue of InSITE

Don't have FOMO, Come to Memphis!

Sandra Colley | SITE President

2019 SITE Annual Conference - June 24 – 26

The Peabody Memphis
149 Union Ave
Memphis, TN 38103

**Kirkpatrick® Strategic Evaluation Planning
Certification Program**

Special registration rates available to SITE Members!

SITE MEMBER BENEFITS

1



TANGIBLE SAVINGS
\$200 Savings on SITE's Annual Conference
\$375 Savings on SITE's Train the Trainer
Corporate Membership Savings
Exclusive Company Rates for Train the Trainer

2



FREE INSURANCE TRAINING RESOURCES
Monthly Webinars
SITE Virtual Huddles
Quarterly Newsletter
Trending Articles & Resources

3



EDUCATIONAL OPPORTUNITIES
Train the Trainer for Insurance Professionals
A.M. Best Recognized Insurance Training Designation
Access to Archived Webinars on Insurance Training

4



PROFESSIONAL DEVELOPMENT
Contribute to Insurance Publications
Speaking Opportunities at SITE National Events
Various Leadership Opportunities

5



BUILD YOUR NETWORK
Access to SITE Membership Directory
Regional SITE Socials
SITE's Social Media Groups



PRESIDENT'S MESSAGE

Don't have FOMO, Come to Memphis!

Sandra Colley, SITE President

sitepresident@insurancetrainers.org

Merriam-Webster defines FOMO as fear of missing out: fear of not being included in something (such as an interesting activity) that others are experiencing. With our line-up of great speakers and events, you do not want to miss SITE's Annual Conference, which is scheduled for June 24-26, 2019 in Memphis, TN.

Top 5 Reasons to Attend SITE's Annual Conference:

1. Learning Tracks to Fit your Needs

SITE has three learning tracks this year: Instructional Design, Learning Technologies, and Operationalizing Learning (demonstrating business value). In each of these tracks, we have experts, who are new to SITE, coming in to share their knowledge with our attendees.

2. Cannot Miss Keynote Speakers

Our opening keynote is Brian Ahearn, who is an expert in persuasion. He will be sharing the application of influencing without authority, which is common amongst learning professionals. Our closing keynote is Dr. Jim Kirkpatrick, one of the creators of the New World Kirkpatrick Model and founding member of The One and Only Kirkpatrick®. He will share how to structure learning initiatives so they enhance on-the-job performance and impact the bottom line.

3. New Vendors to Meet Your Needs

Today's buzzwords in learning include: AR/VR, avatar simulations, and adaptive learning. Come meet our vendors who can share their expertise and technologies to meet your business' needs.

4. Networking with Other Insurance Training Professionals

There is no other conference that allows you to learn and share with other professionals specific to the insurance training industry. You will also hear more about SITE's new mentorship program which will provide for a more formalized mentor-mentee relationship around a variety of topics.

5. Historic Location

SITE's conference is being hosted at the historic Peabody Hotel. Fun facts: The Peabody Hotel is the home of the Peabody Ducks and has hosted Presidents including Andrew Johnson and Harry S. Truman, amongst others. Elvis even attended a prom in the Continental Ballroom of the Peabody. Be part of history and enjoy great programs at an inspiring location!

After reading the above you may have felt a twitch. That twitch is the first symptom of FOMO! Register today and put your FOMO to rest at SITE's website (<http://www.insurancetrainers.org>). Don't forget, multiple attendees from the same company are entitled to a \$100 conference registration discount!

I'll see you in Memphis!

Sandra Colley
SITE President

SITE News

Welcome New Members!

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

William Alexander, AAM, AINS

Adjunct Advisors LLC

Meg McKeen, CIC

American Integrity Insurance Company

Jessica Scrape, P&C

CSE Insurance Group

Andrew Poso

Frankenmuth Insurance

Nick Burri

Randi Hetzner, CPCU, APA, AU-M, AIS, AINS

Maggie Steele

FWD Life Insurance

Loraine Joy Abalena

Zyra M. Abuhon

Philsan Adrados

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Christopher Alonzo

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Paola Anna Buted

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June Rose Dela Torre

Aimee Joy Lora

Karen Camille Manalac

Zhaun Claude R. Ortega

Gerald Oyardo

Patrice Sichon

Grinnell Mutual Reinsurance Co.

Tom Carlson, CPCU

Ryan Sims

Marsh & McLennan Agency

Jessica Griffith, CRM, CPCU, CIC, CISR, ACSR

Angela Lanehart, ACSR, CIC, CRM, CISR

MetLife GA Property & Casualty

Susan Dean Valencia

Missouri Employers Mutual

Brandon Bennett

Yolanda Burnett

Nationwide

Stacy Dunbar, ACC, PMP, SPHR, SHRM-SCP

Andrew Gray

Jordan Heissner

Roundtable Learning

Scott Stachiw

Sedgwick Claims Management Services

Evette Durrah

Robin Gibbs

Bridgett Jordan

Somer Sumpter

Southern Farm Bureau Casualty

Robert Smith

Specialty Insurance Group

Melissa Dehn, CPCU, ARM, CRM

Utica National Insurance Group

Patricia Healey, CIC, AU, CPIW

Verisk

Shabaz Ali

West Bend Mutual Insurance

Sarah Riehle

SITE Congratulates New ITP Designees

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

- Leah Jaramillo, ITP - Ensure Talent - January 2019

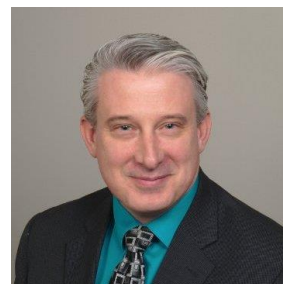
For a full list of our ITP's - please [click here](#).



Welcome Patrick Wraight, SITE's newest Member at Large

Patrick Wraight, CIC, CRM, CISR, AU, AINS
Director, Insurance Journal's Academy of Insurance

Patrick is currently the Director of Insurance Journal's Academy of Insurance. Over his 15-year insurance career he has worked as a Commercial Underwriter in niche markets, such as fire departments, home medical equipment dealers, dude ranches, and outfitters and guides. He began his insurance education career as an underwriter trainer with a large property insurer in Florida.



Patrick is currently working on the CPCU designation.

"When I was first introduced to SITE, I was intrigued that there would be a professional association specific to insurance educators. I am excited to be a member of SITE. The opportunities to learn and grow from so many others who love to help people grow in their careers is staggering to me. I am honored and humbled that I have been accepted on the SITE board. I honestly didn't see this coming and I plan to work hard to grow SITE and make it even better for the future". – Patrick Wraight

2019 Lois A. Markovich Innovation Award - Now Accepting Nominations!

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

The winner will be recognized at our 2019 Conference in Memphis, TN (June 24 - 26). The award recognizes organizations for new and innovative training programs as well as commitment to continued improvement through innovation.

[Now accepting 2019 nominations - Due May 1, 2019](#)

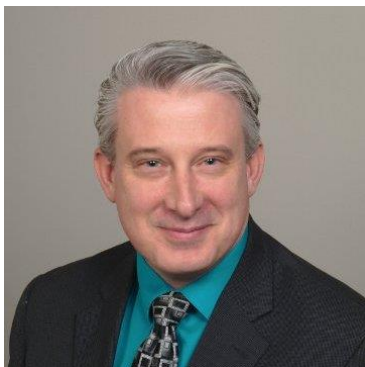
Getting Social!

A great time was had by all at a recent Eastern Region SITE Social. Check out the Upcoming Webinar & Events section of this issue of InSITE for information on future SITE Socials.

(From left to right are Maria Barnes, Rose Gross, Marcia Moore, Sandra Colley, Jane Ahearn and Brian Ahearn).

Keep up to date with upcoming offerings by visiting www.insurancetrainers.org.





PATRICK WRAIGHT
CIC, CRM, CISR, AU, AINS

Insurance Journal Academy

Director

3 Mistakes that we Make in Training New Underwriters

The first days in a new company or in a new role set the tone for the rest of the time a person spends in that role, or at that company. The people, experiences and training that a person comes into contact with all play a part in telling the new team member about what they can expect for their new role.

That's why new underwriter training must be more than just hours in a classroom, studying the rules and guidelines, learning the system, and focusing on required production. All that does is turn an underwriter into a tool of production, rather than making them into the trusted partner that they should be. Here are some of the biggest mistakes that we make when we design new underwriter training programs.

1. Quantity over quality

"We need to design a training program that lasts for four weeks."

"We need them in training for only four hours a day. We want them getting used to the real world, too."

One of the benchmarks of a training program is how long it takes. You're in grade school until you complete the 13-year cycle. We talk about undergraduate degrees as being a four-year college degree. Without a lot of searching, you can find MBA programs with their primary marketing copy telling you that it'll only take 15 months (or thereabout). The time a program takes is a benchmark for training. It isn't anywhere near the best one, but it is a common one.

When you use time as the primary benchmark of a training program, you end up backfilling the content and experiences into that time outline. You decide on what the essentials are based on the amount of time that you have. You make sacrifices to make sure that the calendar is complied with. In short, your primary goal becomes meeting the time requirement.

Most learning professionals deal with this thought process on a regular basis. The question from the partner isn't what they will learn, but how long will it take for them to learn whatever it is. That's why we need to design our curricula around what the new underwriter needs to know and then back fill everything into a calendar.

So what does an underwriter need to know? Some of that depends on whether they are a commercial multi-line underwriter, or a personal lines (homeowners') underwriter. Here are some thoughts, feel free to disagree.

- Insurance fundamentals: how insurance works, why it works, and the basics of how it's regulated
- Coverage: reading and understanding the policies that they will work with is important, not just the ability to memorize a particular policy, but how to read policies so that when they change, they aren't caught off guard
- Risk: insurable and uninsurable risks, acceptable and unacceptable risks

- Guidelines: what's the framework that they will be working in and how can they navigate it successfully
- Sales: an underwriter needs to be able to sell their decisions to agents and to management.
- Strategy: an underwriter needs to understand how the micro decisions affect the macro picture and work within a strategic underwriting plan.

2. Teaching over team building

The classroom is not a dead proposition. Not all learning can and should be done online. Many learners like sitting in a classroom environment, having the interacting with other learners and a facilitator. The classroom is also not the only place where learning happens, though.

The classroom is often mostly about an instructor giving instruction. There are times when there isn't much context given. It certainly feels like it's separate from the daily work, doesn't it? That feeling gets amplified when the business partner asks when they can have their team member back for some actual work?

Some great learning can be done in the context of the team space. That's where we put the new underwriter with their team, sitting side by side, watching (even interrupting) the flow of work. It's a time to learn names and personalities. It's time to begin to build the team around the new person, showing off the team personality and the new team member's personality.

When you bring the new underwriters into the classroom, you should spend time unpacking what happened when they were with their teams. Hopefully, they can go to different teams. That turns into conversations about how the business works from different seats. That also makes the new underwriter a friend and colleague when they launch into their new team.

3. Rules over reality

If you've been an underwriter or been involved in underwriter training, the business unit often wants their guidelines taught like they are hard and fast rules. We are not advocating that we teach underwriters to ignore the rules and do their own thing. What we do advocate is the use of guidelines in a way that shows underwriters how to analyze risk.

When underwriters know how to analyze risk, and understand the rationale behind guidelines, they are better underwriters. They know when it makes sense to look for an exception and when it doesn't. They know when to recommend a change to the guidelines and when they need to stay as is.

More than ever, technology can take the place of people who simply look at guidelines like hard and fast rules. More carriers are moving certain segments of their books of business to their auto-underwriting software. The software can look at risks and decide if they fit the box. In some cases, it can even recommend action for risks that don't fit the box based on how the algorithm is created.

In order to move someone from being the new person into the valuable team member as quickly as possible, we need to equip them with the tools that they need to succeed. Those tools include the ability to think within the guidelines and to think outside of the guidelines. If they understand how to think about the individual risk and how it fits into the larger book of business, they can make informed decisions about the risk, rather than simply saying "yes, it fits" or "no, it doesn't fit."

Underwriting training is a key to creating a long-term insurance career for some people. It is the key to building and maintaining a profitable book of business for the companies. It is the key to building and maintaining great agency relationships with those who bring the business in.



DR. MARY LIPPITT

Enterprise Management LTD.

President

A New Approach to Blended Learning: A Training and Consulting Practicum

Over my more than 30 years in Human Resource Development (HRD), I continue to search for ways to deliver impactful developmental programs that address organization goals. Luckily I am not alone. Several new approaches advance effectiveness including immersive learning, operationalized learning, and blended learning. However, I think we can add another to our toolbox. We can redefine what we mean by blended learning. Traditionally it means merging online and classroom learning activities, but another combination is possible. Training and consulting can be combined to help learners discover new opportunities and remedy performance barriers. This approach, which I refer to as a practicum, delivers impactful results while reinforcing learning through immediate application. Since practicum participants select, investigate, and propose a plan to address an issue they select, action and results are almost guaranteed.

Practicums enable participants to work on an opportunity or problem that they choose for their unit. Tackling the desired issue with continued support and guidance after training creates a safe and motivating environment. Examples of the issues addressed include: removing bottlenecks, curtailing customer fraud, altering roles and responsibilities, streamlining workflow, reducing cycle time, establishing a system to verify vendor contract compliance and enhancing onboarding practices.

Let me outline the practicum's key elements.

- First, multiple units send approximately four members to the practicum half-day training sessions. Typically, four to six units enroll between three to five unit members. Having multiple participants from each unit improves issue analysis and builds support for change.
- Second, four half-day training sessions conducted approximately three weeks apart on how to evaluate a unit's existing practices, policies, and systems to search for ways to improve effectiveness.
- Third, after each training session, each unit cohort completes a follow-up assignment applying what they have learned. The assignments reinforce what was learned and launch the unit analysis process. They also extend the learning and engage more unit members in the evaluation process, which builds acceptance and ownership for all actions leading to support for the final improvement plan.
- Fourth, application assignments for each unit after every training session. These assignments guide the unit to identify, evaluate and propose an improvement initiative complete. The carefully crafted initiatives include a cost-benefit analysis and implementation steps. This level of detail ensures a highly feasible proposal, rather than an unrealistic or aspirational initiative.

- Fifth, a shift from training to consulting with the goal of transforming learning into results. In this step the consultant offers insightful questions, coaching to ensure follow-through, and facilitating to resolve difficult issues over three sessions. During this fifth stage, the unit leverages the data collected during assignments to surface new opportunities, evaluate those ideas for risks and benefits, select an initiative, and prepare a compelling proposal. The proposal must include a cost-benefit analysis, an implementation plan, and a monitoring process. Presentation tips might also be requested at this stage.
- The final step is a formal presentation to the unit and its manager to gain approval for the initiative. In reality, the information had been exchanged throughout the process and the identified concerns were incorporated into the final proposal. This step offers an opportunity to celebrate the analytical, creative and dedicated work of the team members.

The holistic design outlined above presents just one way to combine training and consulting. I invite SITE members to consider others approaches for blending training and consulting.



GREGG GOLSON
CPCU, ACS, AIC, AIM, AINS, AIS, API,
CSM

J.S Held University at J.S. Held LLC.

Vice President and Program Director

How Performing a Premortem Can Help Your Training Be More Successful

You've probably heard of the term postmortem. Have you ever heard the term premortem? The term premortem means performing a prospective hindsight. Before you plan your next training, imagine that it massively failed, then work backwards to determine why it would have failed. Next plan the meeting in a way that avoids or mitigates the causes of the prospective failure.

Let's try an example. Your company is growing, and you have 27 new staff starting that need both onboarding. The newbies also need training in claims as several of them will be in the claims call center. You have eight hours over two days to perform the onboarding and the claims training before the new staff go live. Your company has done the same onboarding presentation for four years but never to a group this large. This training is both HR-related and new knowledge-related.

The training starts three weeks from now on a Monday and Tuesday. Sit back in your chair and close your eyes. Now imagine your boss's boss at your doorway on the Wednesday day afternoon...scowling. She takes a deep breath, moans, and lets out a sigh then points toward her office.

"Now!" is the only word she says to you.

For the longest 45 minutes of your life, you listen to her berate your so-called training you did the two days before. Four of the new staff have quit; three showed up in shorts and sandals for work, and your boss's boss had gotten six complaints from customers. She demands you redo the training again, and this time there better be improvement.

Wow, now that's a brutal imagined event. How can I evince you to now do step two of the premortem to mitigate the causes of this tragedy and fill the gaps between failure and success?

First, it's clear that either two four-hour days isn't long enough, or our training wasn't impactful enough on both the technical and the HR issues. Let's do a refresh on our training and ensure we are engaging the new staff. Instead of just bullets for the company dress code, we provide photos and examples of what is allowed and disallowed.

Next, let's set a brief meeting with our HR staff to see if we have data to show us why new employees quit after only a few days. Maybe we discover that new staff leave because they don't feel like they are part of a team, or that they have a tough first few days handling the volume of incoming calls.

Did we do any research into each of the new staff's prior experience levels. What if we found almost three quarters of the new staff had call center experience but only two had claims knowledge? We might have all the

new staff attend the HR onboarding but only those with no call-in experience attend the call center training. We may spend more time on FAQs we receive and working on the flow charts of our answers.

Lastly, on go-live day for the new staff, we have each one sit with an experienced call-center employee to watch, learn and then have the employee coach the new staff that day. The new staff don't fly solo until they have completed five new calls in a row successfully.

Now, let's re-imagine it's go-live Wednesday afternoon and your boss's boss is back in your doorway. This time she's grinning and pointing to the training room. Not a person of many words, she says, "Nice job, next week we have 33 starting."

Here are a few questions to ask, when you are performing your next premortem:

- Holy crud! How did that happen?
- WHO - Did we have too many levels of knowledge in the same session (from none to some with advanced level of subject matter knowledge)?
- WHAT - Did our training expose a problem we didn't have an answer ready for?
- WHERE- Was our training held in a room with too many distractions (both noise and visual noise) for the attendees to concentrate?
- WHEN - Was our training held during a time when the attendees had imminent deadlines? Was it held too close to a holiday with many staff or key members on PTO?
- WHY - Did employees understand why they were being trained and what for?
- Was our canned training stale and out of date? Did it contain inaccurate information, misspelled words or bad grammar?
- Did we prepare strong take-away material, and did we do follow-up to reinforce the training?
- Did you apply the 'rule of 7' for important material and reinforce it in different ways?

Proper pre-planning is always a must for any training session. But if we take it one step further by holding our own premortem session, we can raise our training success rates by preventing future failures.

Gregg Golson CPCU, ACS, AIC, AIM, AINS, AIS, API, CSM, is Vice President and Program Director for J.S. Held University at J.S. Held LLC. *J.S. Held* is a leading global multi-disciplinary consulting firm, respected for our exceptional success addressing complex matters around the world. You can view examples of J.S. Held LLC technical papers that can assist training your staff at <https://jsheld.com/university>.

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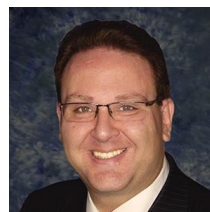
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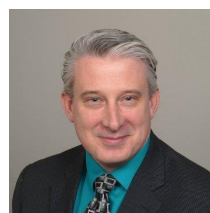
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Upcoming Webinars & Events

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

March 14 - Insurance Journal Academy Webinar

Teaching Insurance Coverage Without Putting People to Sleep

Presented by: Patrick Wraight, CIC, CRM, CISR, AU, AINS

Price: All SITE Members and prospects can attend the program for free. Please use the coupon code "SITE" to receive your free registration. Post registration, you will receive an email from Insurance Journal with instructions to join the webinar. **Remember to add this information to your calendar.**

[Register Today!](#)

March 22 - xSITE Talk (30 min webinar)

Tapping into the Hidden Recesses of the Mind with Pre-suasion

Presented by: Brian Ahearn, CPCU*

**2019 Annual Conference Keynote Speaker*

[Register Today!](#)

March 29 - SITE Coffee Talks

Time: 7:30 a.m. - 9:00 a.m.

Location: Olentangy River Brewing Company

303 Green Meadows Dr. S

Lewis Center, OH 43035 (Columbus area)

Topic: Creating Engaging Insurance Training

Join us for SITE Coffee Talks, a topic-focused morning event for insurance training professionals that offers a relaxed setting for discussing best practices and lessons learned around a pointed insurance learning topic. The event is free and all insurance training professionals are welcome (SITE Membership is NOT required). Please RSVP to assist with head count, RSVPs can be sent to office@insurancetrainers.org.

April 17 - Eastern SITE Social

Time: 5:30 p.m. – 7:30 p.m.

Location: Houlihans

1735 US Highway 46

Parsippany, NJ 07054

Contact Evelyn Jorgensen to RSVP - evelyn.jorgensen@selective.com

June 24 - 26 - 2019 SITE Annual Conference

Join us this June for the 2019 Society of Insurance Trainers & Educators Annual Conference in Memphis, Tennessee!

[Register today!](#)

Hotel Information

The Peabody Memphis

149 Union Ave
Memphis, TN 38103

Nestled in the heart of downtown, The Peabody offers a one-of-a-kind experience just blocks from Beale Street, the Memphis Rock 'n Soul Museum, the Gibson Guitar Factory, Fed Ex Forum, Sun Studio, the Orpheum Theatre.

SITE has secured a special reduced rate of \$199 per night for SITE attendees (Traditional Queen or Superior Double Rooms). All rooms are subject to a \$12.95 per night, hotel service fee. Make your hotel reservations directly with The Peabody Memphis by calling 1-800-PEABODY, or online at:

<https://www.insurancetrainers.org/hotel-information>. Be sure to mention you are with SITE and make your reservations by **Tuesday, May 28, 2019** to receive this special reduced rate.

SITE can only reserve a certain number rooms at the discounted rate. Once the room block is sold out, even if that day is prior to the cutoff date, a higher prevailing room rate will apply.

Kirkpatrick® Strategic Evaluation Planning Certification Program

Thursday, June 27, 2019 - 8:30 a.m. – 4:30 p.m. - Additional Fees Required

The Kirkpatrick Model represents more than just training evaluation. It forms the framework for the Kirkpatrick Business Partnership Model, a holistic process that creates, delivers and demonstrates training value.

In this program, you will learn how to build business partnerships and create collaborative plans to maximize business impact through all phases of the training and performance process. You will study worldwide best practices and share your own experiences in an interactive, conversational environment. You will use your own programs for application activities, so actual work gets completed during the session.

Particular attention is given to business acumen and speaking the language of the business when making your case for training resources and support. You will receive a workbook containing templates, samples and tools that will enable you to apply what you learned to all future programs within your company.

The Kirkpatrick Business Partnership Certificate Program was the predecessor to this program. It covered similar yet less comprehensive content. If you participated in that program, please call before registering for this one.

[Click for registration information - direct through Kirkpatrick Partners](#)

Discounted registration fees available to confirmed Society of Insurance Trainers & Educators (SITE) conference attendees.



2019 SITE ANNUAL CONFERENCE
JUNE 24 - 26, 2019
THE PEABODY MEMPHIS *Memphis, Tennessee*

KEYNOTES

Brian Ahearn, CPCU, CTM, CMCT
Influence PEOPLE

Jim Kirkpatrick, Ph.D.
Kirkpatrick Partners

Photo credit: The Peabody Memphis

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.

Upcoming Train the Trainer Dates

June 22 - 23, 2019

In conjunction with the 2019 SITE Annual Conference

The Peabody Memphis
149 Union Ave
Memphis, TN 38103

**Registered Train the Trainer participants receive a \$100 discount on their registration fee to attend the SITE Annual Conference.*

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

Registration Deadline: April 22, 2019

August 20 - 21, 2019

Markel Corporation
16100 North 71st Street, Suite 200
Scottsdale, AZ 85254

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

Registration Deadline: June 25, 2019