

InSITE



SUMMER NEWSLETTER



Inside this issue of InSITE

Reflecting on Ten Years...

Sandra Colley | SITE President

2019 SITE Annual Conference - June 24 – 26

The Peabody Memphis
149 Union Ave
Memphis, TN 38103

2019 SITE Annual Conference

Keynote Speaker Preview

Train the Trainer

Additional 2019 Dates Added!

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
AM 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 Societies
SITE's Social Media Groups



PRESIDENT'S MESSAGE

Reflecting on Ten Years...

Sandra Colley, SITE President

sitepresident@insurancetrainers.org

I am in my tenth year of being a SITE member and I have had the privilege of serving as the President for the past two years. Reflecting on what SITE has taught and provided me both personally and professionally, I owe much to this great organization. In training we are being asked to show our quantitative value versus just the qualitative benefits. While there are many quantitative benefits of SITE membership the qualitative have proved just as, if not more, beneficial to me over the last ten years.

When I first started in the insurance training industry I did not know anything about insurance or training. Luckily, I had a company that trusted they could teach these to me. I had great co-workers who brought me to my first SITE conference (Indianapolis) and ensured I attended the right sessions to start building a solid base to grow upon. I walked away from my first conference with a network of peers that I could rely on for advice and collaboration. The contacts I made at Top 100 insurance companies allowed me to set benchmarks for our team and improve our programs. None of these benefits have a specific dollar amount, but they have proven invaluable to my training growth and development.

Down the road the peers I met have turned into mentors and lifelong friends. People whom I text when our son and daughter were born are the same individuals I text when I am interested in how their Claims Onboarding program works or what software they use to create microlearning. SITE has become the go-to organization for me on many levels and it has proven priceless in what it has offered me.

These relationships and benefits have come because of the involvement I have had with SITE. There are still many tangible benefits SITE has offered me: attending the Train-the-Trainer program, volunteering on committees, attending SITE webinars, speaking at conference, obtaining my ITP designation and becoming a board member. I find there is much truth to the saying "you get what you give". In addition to the intangible, it is through being an active member and utilizing SITE's tangible programs and benefits that I have been able to grow as an insurance learning professional.

I understand that SITE must show our tangible benefits to organizations to continue to maintain and grow membership. However, I feel I would be doing a disservice to each of you, if I too did not show the intangible or qualitative benefits that SITE has to offer. For it is those qualitative benefits that have made just as much an impact, if not more, than the quantitative benefits.

I want to thank each of you for your trust in me as your President over these past two years and I look forward to continuing as an active member of SITE for many years to come. I cannot wait to attend our conference in less than a month and to continuing growing my learning knowledge and expertise at The Peabody Memphis. Cheers!

Best regards,

Sandra Colley
SITE President

SITE News

Welcome New Members!

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

BoatU.S. / GEICO

Trisha Brady, AIC, CTC

Chubb

Andrew Gibb, CPCU, AINS

ExamFx

Melissa Dillon

Federated Insurance

Elizabeth Nielsen

LaRae Nordlie, AIM, AU, AIS, ACS, AINS

Renee Stoltz, AINS, AIS, ACS

Kristin Warehim

Frankenmuth Insurance

James Boyd, CPCU, ARC, AIC, AAI, AINS, AIS

Haag Education

Ryan Holdhusen

I-CAR

Keith Going

IMA Financial Group, Inc.

Stephanie Weakley, AINS, AIC, ARM

Independent Insurance Agents & Brokers of Illinois

Brett Gerger

LexisNexis Risk Solutions

Daci Bullard

Konesha Martin

Adrian Midgett

Nationwide

Julie McWhorter, MA

Orlando Insurance School, Inc.

Anthony Becerra, Certified Adjuster

Primerica

Luis Alonso Lobo Jimenez

State Farm Insurance

Heather Blevins, CPCU, AIC, AINS, AIS, SCLA

Texas Mutual Insurance Co

Tai Jenkins

The General

Jennifer Morris

The Institutes

Adenike Adeniji

Joanne DiNunzio

The Institutes

Elisa Murray

West Bend Mutual Insurance Company

Laurie LaDuke, CPCU, CIC, AU, ARE, AIM, AINS, AIS

Western Reserve Group

Jocelyn Rodgers, AIC

SITE Congratulates New ITP Designees

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

- Brandon Huff, ITP - Nationwide - March 2019

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



SITE 2019 - 2020 Board Nominations

The Nominations Committee of the Society of Insurance Trainers & Educators (SITE) announces the selected nominees to serve on the SITE Board of Directors for a term which begins June 26, 2019.

President

Larry Nicholson
American Integrity Insurance Company

Director of Conference*

Maria Barnes
Nationwide

VP Member Services

Mario Kyriakides
Hanover Insurance

Director of Programs*

Vacant

VP Conference

Brandon Huff
Nationwide

Director of Communication*

Chianti Tinsley
Primerica

VP Marketing

Heather Blevins
State Farm Insurance

Director of Benefits*

Evelyn Jorgensen
Selective Insurance

VP Program*

Patrick Wraight
Insurance Journal Academy

Immediate Past President

Sandra Colley
Nationwide

Secretary/Treasurer

Steve Cline
Zurich

Ex-officio Member – Legal

Art Carvajal
WebCE, Inc.

**pending bylaws approval*

SITE Bylaws Changes

[Please click here](#) to find proposed changes to the SITE Bylaws. This revision of the Bylaws deletes obsolete provisions and conforms certain provisions to current practices.

The SITE Bylaws will be voted on at the 2019 Annual Business Meeting on Wednesday, June 26, 2019 at 11:30 a.m.

(Note: Words ~~stricken~~ are deletions; words underlined are additions.)



CHIANTI TINSLEY

PRIMERICA

AVP and Training Designer

2019 SITE Introduces TWO Keynote Speakers

We hope you have your calendars marked to join SITE members in Memphis, TN. We are only two months away from #SITEMemphis, a Professional Development Conference for the Insurance Industry. This year's conference is featuring TWO incredible keynotes, that will share the importance of realistic training.

Opening Keynote: Brian Ahearn, CPCU, CTM, CMCT - "The Influencer"

Brian Ahearn has been an influencer in the insurance industry for more than thirty years. He is one only of only 20 people around the world certified to teach the principles of persuasion on behalf of Robert B. Cialdini, PhD., the most cited living social psychologist in the world when it comes to the psychology of persuasion. Brian believes that aligning talent development efforts to ethical persuasions will effectively enhance your role to move people to do what's in their best interest. In the opening keynote session, SITE has the pleasure to introduce Brian and learn about **"How to Influence People Without Authority."**

Brian's blog "Influence PEOPLE" has readers in more than 200 countries and was named one of the Top 30 Psychology Blogs of 2012 by the Online Psychology Degree Guide. In 2016, Brian was named one of the Top 100 Influencers by The Science of Digital Marketing. Brian's LinkedIn Learning course [Persuasive Selling](#), has been viewed more than 150,000 times.

Take a moment to [view Brian's course](#) to get to learn more about your Opening Keynote Speaker, Brian Ahearn.

Closing Keynote: Jim Kirkpatrick, Ph.D. - "The Visionary"

Dr. Jim Kirkpatrick has been a visionary for more than twenty years and has combined his corporate and training experience to consult and provide the ultimate vision to a company's goal. Dr. Jim Kirkpatrick is co-owner of Kirkpatrick Partners. He is an expert in training evaluation and the creator of the New World Kirkpatrick Model. Jim is passionate about assisting learning professionals in redefining themselves as strategic business partners to become a viable force in the workplace. Jim will share with SITE attendees the newest ways to implement Level 3 and 4 of the Kirkpatrick Model and how **"Creating Believable Value"** will impact your professional input in your own organization.

Jim delivers live keynote addresses and conducts workshops and co-authored three books with his father, Don Kirkpatrick, who is credited with creating the Kirkpatrick model. He has also written four books with Wendy Kirkpatrick, including "Kirkpatrick's Four Levels of Training Evaluation" and "Training on Trial."

Visit [Kirkpatrick Partners](#) website to learn more about your Closing Keynote Speaker, Jim Kirkpatrick, Ph.D.



PATRICK WRAIGHT
CIC, CRM, CISR, AU, AINS

Insurance Journal Academy

Director

Building an Engaged Classroom

If you get more than one professional in a room, you have people who are at different stages in their growth and development. That fact alone makes insurance coverage training difficult. Consider a classroom event held for a specific company. In a room that seats 25 people, you have the wily veteran who dares you to teach him anything and because of his experience, if you don't keep him engaged, he'll be a disruption. Next to him is the eager rookie who wants to devour everything that you can teach her, but because of her inexperience, she can become overwhelmed and lose interest.

Have you ever attended (or taught) a class, like a Certified Insurance Counselor (CIC) class, where people gather into one classroom? You have underwriters and agents sitting next to each other. You have people who are taking their first class and others that have been taking these classes for over 20 years. And they're all together. What are you going to do?

Use the right language.

Can I be honest for a moment? People like to impress each other by using big words that they barely understand. It's true. More than that, we can get so focused on the language of insurance that we forget that not everyone speaks insurance. When you're in front of a group, it's important to continue to use the insurance language. You can't talk about loss situations without discussing indemnity payments and loss adjusting expenses. You also can't assume that everyone knows exactly what you're talking about when you use the word indemnity.

You don't actually have to define the words that you're using, but you have to be aware of some words that might need explanation and explain them. Rather than going into a cold academic definition of indemnity, you could use it correctly in context a few times, providing a way to connect it to an idea. If you can paint the picture that an insured had a loss and when the payments came, they restored the insured to essentially the same financial condition that they were in before the loss (i.e. the roof got replaced, the medical bills got paid, etc.).

Use the right ideas.

Insurance is complicated, but it isn't impossible to unwind all of the complications and present ideas in a way that makes sense. If you're teaching a class on a homeowners' policy, you could start right at the most complicated idea in it, and there are people who will be with you. You could also start at the simplest place you can think of (this is a house...), and insult everyone. Neither of these seems like the best idea.

On the other hand, as you are teaching, go ahead and handle the tough stuff. We all know that there are difficult parts of policy forms, rules, underwriting guidelines, etc. that we don't always want to deal with, whether the questions are too hard, or we just aren't comfortable with the content. It happens. When you have concepts that are really hard to understand, you may have to spend extra time with them.

Automobile coverage is complicated. It doesn't seem like it should be, but it really is. Every state has its own rules. In most states, you can get uninsured and underinsured motorists' coverage. While this coverage works

essentially the same in every state, each state has different requirements. In Alabama, if you have a commercial auto policy, the policy provides automatic stacking of uninsured motorists coverage for up to three vehicles. Not every state allows for stacking coverage.

Having introduced that idea into the conversation, you have the chance to go to the rookies and bring them in closer by explaining stacking coverage. Better yet, you have a chance to engage the rookie and the veteran by getting the veterans to explain stacking coverage and offer a (short) story.

Use the right stories.

That brings us around to one last thought. Teach hard insurance concepts by telling stories. Stories attract everyone. People may say that they don't like to read, but everyone likes a good story. We live in a story telling world, the technology is the only thing that's changed. It used to be that people told stories around a fire. Today, we tell stories through social media, blogs, podcasts, video, and books.

Did I already mention that insurance is complicated? It's still complicated. The best way that you're going to create engaging discussions, especially around policy language, is through the use of a story. Whether you create scenarios to apply policies to, or you introduce policy language through a story, the story is the vessel that brings the learning to the people around you.

The stories that you bring will help to engage everyone in the audience. The rookie will be riveted because your story connects the policy to life. The veteran will be engaged because your story will remind her of a story. When you give her a chance to tell her story, that will bring a story to someone else's mind. We know that you can't give everyone the chance to tell a story, but the more stories that you can tell, and the better you can tie them back to the topic at hand, the more engaged the room will be. The more engaged the room is, the more learning happens.

They'll forget the textbook definition of indemnify, but they'll never forget the great-grandmother whose roof was replaced.

Teaching insurance is hard. Keeping a classroom engaged in a hard topic is hard. Do yourself a favor and do everything you can to keep their minds with you until they've learned all that they can on that day and they're excited to come back to another session.



CHELSEA WALTERS

Selective Ins. Co of America

Claims Learning Management Specialist

Key Components in Workers' Compensation

Workers' compensation is an elaborate and complicated line of business to both teach and learn. The process can be overwhelming without the proper understanding and approach. There is a myriad of boxes to check to ensure proper claim handling; however, the essence of handling workers' compensation claims boils down to four important factors: organization, investigation, empathy and evaluation.

Organization

As with all lines of business, organization plays a key role in successful workers' compensation claim handling. From verifying coverage to approving medical treatment and eventually resolving the claim, a plan must be in place. By creating spreadsheets, checklists and utilizing a diary system, adjusters are more likely to stay on track and not miss crucial steps. These methods will vary from adjuster-to-adjuster and may require some trial and error; however, it is important for each adjuster to have a system in place for effective desk management and efficient claim handling. When training workers' compensation adjusters, be sure to stress the importance of desk and diary management for both tracking personal progress as well as adhering to any time-sensitive requirements.

Investigation

Leave no stone unturned. Investigation does not stop after an adjuster confirms coverage and determines compensability. Investigation should continue throughout the lifetime of a claim – this can include identifying questionable circumstances, studying pre-existing medical conditions or noticing frequency of claims. It is important to teach adjusters not only about the resources they have available to them within the company, but the questions to ask and the red flags to look for. By helping them build their investigative arsenal in the beginning, you provide them a solid foundation on which to build their instincts in the future.

Empathy

When handling claims, the ability to put yourself in someone else's shoes becomes extremely important. Workers' compensation is unique in that adjusters have multiple parties to understand and relate to – the insured and the claimant. For some, it may come easier to empathize with the issues the insured is encountering, as they are the customer; however, it is equally important to empathize with the claimant. It is critical that adjusters understand that the claimant is more than just a claim number – they are a real injured person who is out of work and needs help. Consider having adjusters take “mock statements” – utilize experienced staff to create fictitious claimant scenarios and challenge the adjuster to take their statement as a way to practice showing empathy and explaining the claims process. This gives the adjusters a chance to “work out the kinks” and become comfortable with the process before handling live claims.

Evaluation

Evaluating claims can be a difficult skill to learn. As a trainer, the classroom emphasis should focus on good faith claim handling – prompt, fair, and timely evaluations. Claim evaluations should always answer the question, “What do we owe?” For proper evaluations, adjusters should familiarize themselves with the benefits allowed in their jurisdictions. Teach adjusters to study the facts, remain objective and look at the big picture, taking all potential benefits owed into consideration.

While workers’ compensation may seem daunting at first, understanding these four major components can help adjusters alleviate anxiety and approach these claims with confidence.

Board of Directors 2018 - 2019



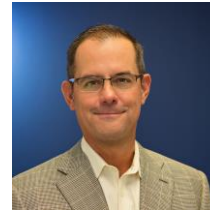
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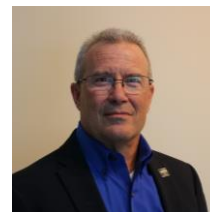
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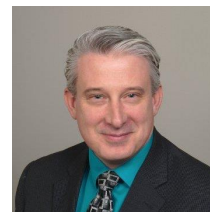
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Upcoming Webinars & Events

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

June 24 - 26

2019 SITE Annual Conference

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



The banner features a central logo for the SITE Conference with the tagline "Where Learning is King" and "Memphis, Tennessee 2019 JUNE 24-26". To the right, it reads "2019 SITE ANNUAL CONFERENCE JUNE 24 - 26, 2019 THE PEABODY MEMPHIS Memphis, Tennessee". Below this, two keynotes are listed: Brian Ahearn, CPCU, CTM, CMCT, Influence PEOPLE, and Jim Kirkpatrick, Ph.D., Kirkpatrick Partners. A photo of The Peabody Memphis hotel at night is on the right, with a photo credit: "Photo credit: The Peabody Memphis".

[Register today!](#)

Hotel Information - Reservation Cutoff Extended to May 30, 2019!

[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, FedEx Forum, Sun Studio and 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 **Thursday, May 30, 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.

Why Train the Trainer?

Are you new to training, need more knowledge on adult learning theory and instructional design, or are just looking for a way to hone your facilitation skills while meeting learning professionals just like you? If you answered yes to any of the above, then SITE's Train the Trainer program is for you! SITE has partnered with The Institutes to fill a much needed gap in the market and provide you with a valuable and industry recognized certification. The live component is a day and a half workshop designed to interact with peers and instructors, practice your skills and get valuable feedback.

Train the Trainer is real world focused. As you work through the online material you will create a training module to present at the live workshop to demonstrate your mastery of the content and receive valuable feedback.

Topics covered online include:

- Understanding adult learning fundamentals
- Analyzing the need for training
- Designing for instruction
- Developing instructional materials and activities
- Delivering instruction
- Creating evaluations

Train the Trainer helps sharpen your skills. The 1.5-day live session completes your learning. In addition to presenting your learning content, you will participate in breakout activities to enrich your classroom management and presentation skills. [Click here for more information.](#)

Upcoming Train the Trainer Dates

June 22 - 23, 2019 – Registration Closed

In conjunction with the 2019 SITE Annual Conference

August 20 - 21, 2019

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

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

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

Registration Deadline: June 25, 2019

November 12 - 13, 2019

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

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

Registration Deadline: September 10, 2019