PIA of Indiana's 2022 Annual Convention

Professional Development Schedule & Course Descriptions

Thursday, May 12th

9:00 a.m. - 10:30 a.m. | Opening Session

The Insurance Customer's Relationship Journey with their Insurance Agency
Presenter: Dr. Billy Williams • Pending 1.5 hours of IN CE

Insurance agents and agencies often overlook the customer experience when operating an insurance agency. This session looks at the insurance customer's relationship journey with their insurance agency. Dr. Williams starts by discussing when a customer completes an online quote request and how they view the process. He then continues through the process of receiving the quote, and every point of contact you have with your clients and how they view your relationship with them.

10:30 a.m. - 12:00 p.m. | Concurrent Sessions

The Insurance Customer Technology Journey
Presenter: Dr. Billy Williams • No CE Credit

The session starts with a prospect completing an online quote request and travels through the various stops on the technology journey, including receiving emails and text messages, completing the application, billing and paying, endorsements, claims, scheduling appointments, requesting policy documents, renewal, special life events, and more. This session will open your eyes and mind to the insurance technology journey from an insurance prospect and customer viewpoint.

Nasty Endorsements in the CGL
Presenter: Sam Bennett • Approved for 1.5 hours of IN CE

The Commercial General Liability Coverage Form is the most commonly-used policy to address liability exposures of our commercial/business clients. This coverage form has proven itself to be a comprehensive and versatile answer for the risk finance needs of those clients. Unfortunately, numerous endorsements can be added to the policy that reduce the scope of coverage in this form. This presentation will introduce some of these nasty endorsements and will remind participants that the agent must be on the lookout for these problematic changes to the policy.

Cyber Liability Basics
Presenter: Chad Guyer & Jennifer Gorman • Approved for 1.5 hours of IN CE

This session discusses the risks to small businesses and nonprofits related to cyber attacks, as well as the coverage and response plans the basic stand-alone policy provides. Small to mid-size businesses and nonprofits are a more attractive target to cyber criminals today than ever before. The common cyber endorsement added to a business policy is often not enough to properly cover certain businesses and nonprofits. This session will help identify common exposures small businesses and nonprofits have and how to address them with small business clients. Along with learning key coverages the policy provides, attendees will also learn to understand cyber risk, loss exposures, and rating factors.

12:00 p.m. - 2:30 p.m.

Annual Tradeshow & Lunch (Free for all Agency Staff!)

Walk through the Tradeshow and visit with exhibitors, grab lunch from the various food stations, and network with fellow agents and company representatives from around the state. If you have never attended our Tradeshow, then you don't know what you are missing.

2:30 p.m. - 4:00 p.m. | Concurrent Sessions

The New Insurance Customer Onboarding Process - Best Practices
Presenter: Dr. Billy Williams • No CE Credit

When a new insurance agency customer is properly onboarded, it sets a foundation that will last the entire relationship. The customer will have a clear expectation of what is expected of them and more importantly, the customer will understand what they should expect from the agency. Most of the items that increase retention long-term will be addressed as part of the new customer process. A properly onboarded new customer will have clean data, they will understand their billing options, they will know what coverage falls below the agency standards and they will have an opportunity to address the weakness. Tools such as the Declined Coverage Form, Google Reviews, and an Agency Branded Mobile App help solidify the process.

Using Insurance to Manage Emerging Risks
Presenter: Sam Bennett • Approved for 1.5 hours of IN CE

As insurance professionals, our 'go-to' tool for managing uncertainty is to finance risk with insurance. This can be effective, assuming that the coverage forms used actually provide the protections we and our clients expect. This presentation will address exposures that were (and still are) emerging, as well as those that have made themselves known but continue to evolve based upon factors such as technology, legislative directives and carrier attitudes/appetite.

E&O Mock Trial: The Wedding, The Drone, and The Misrepresentation on the Insurance Application
Presenters: Casey Stafford & Team • Pending 3 hours of IN CE (ends at 5:30 p.m.)

During this Mock Trial session, the topic of misrepresentation on an insurance application will be addressed. During a backyard wedding, a wedding guest is injured by a drone being used by the homeowner/photographer to take photographs and videos during the ceremony. Learn about the insurance agency's perspective and involvement when this type of claim occurs. Attend this session and see if you can figure out which way the case will end.

4:00 p.m. - 5:30 p.m. | Concurrent Sessions

The Insurance Customer Renewal Process - Best Practices
Presenter: Dr. Billy Williams • No CE Credit

Customer reviews should be a foundational process in an agency. While only about 15% of customers will schedule a policy review appointment, 100% should be afforded the opportunity to review their policies and coverage by sending automatic emails and text messages that contain a link to an Appointment Calendar. Your job is to give them the opportunity, not worry about how many take advantage of the opportunity! This session will role-play the actual Policy Review Conversation that should happen between the customer and the licensed agency staff member.

Personal Lines Claims Scenarios
Presenter: Sam Bennett • Approved for 1.5 hours of IN CE

This presentation will address the risks common for individuals and families and the use of personal lines coverage forms such as homeowner, personal auto and personal umbrella/excess policies as tools to finance risk. A review of important concepts in each form will lead to discussions of claim scenarios. The forms will then be analyzed to determine the outcome of these scenarios.

E&O Mock Trial - Continued
Presenters: Casey Stafford & Team • Pending 3 hours of IN CE (starts at 2:30 p.m.)

5:30 p.m. - 6:30 p.m.

Networking & Cocktail Reception

Sponsored by: Grinnell Mutual

Join us for a snack, a drink, and some networking at the hotel after sessions end for the day.

7:00 p.m. - 10:00 p.m.

Thursday Night Social at Saint Joseph Brewery

Sponsored by: Pekin Insurance, Roush Insurance Services & Selective Insurance

The fun isn't over yet! Join us for dinner, drinks, and even more networking into the evening. If you have attended this event in the past, you know this isn't something you want to miss. **Separate registration is required.**

Friday, May 13th

9:00 a.m. - 10:30 a.m. | Concurrent Sessions

Insurance Fraud - The Crime That Costs Us All!
Presenter: Matt Moore • Approved for 1.5 hours of IN CE

As the second largest crime in America, insurance fraud is as old as insurance – fraudsters are continually scheming up new ways to cheat carriers out of money. This course explores how enormous the problem is – and how consumer's attitudes and perceptions may increase the flow of fraud. As the insurance industry looks for new ways to stem the tide, one thing is certain: we are all victims of this growing crime.

How Owners & Managers Can Turn a CSR's Service Mindset into an Agency Accelerator
Presenter: Sheldon Snodgrass • Approved for 3 hours of IN CE (ends at 12:00 p.m.)

This three-hour, integrity-based, skill-building program is designed to strengthen technical knowledge while empowering CSRs. Unlike sales campaigns that many CSR's wish to avoid, this model is built around the "S" in CSR, service. By following simple action plans that easily fits into any busy schedule, you will write more business, customers and prospects will become more loyal, and they will welcome your conversations.

2022 Legislative Update
Presenters: Andrew Huff & Michael Niland • Pending 1.5 hours of IN CE

It's time to review the current National and State legislative and regulatory issues regarding insurance. Attend this session to hear about current bills, learn what to look for in the near future, and gain a better understanding of how the changes affect your business.

10:30 a.m. - 12:00 p.m. | Concurrent Sessions

The Future is Now: AI & Insurance
Presenter: Matt Moore • Approved for 1.5 hours of IN CE

Insurance is driven by data. Artificial Intelligence (AI) is changing how insurers collect and analyze that data. This course touches on the history of AI, how it changes our lives, specific insurance applications, and challenges to implementation. When it comes to insurance, AI is changing all the rules. The future is now – are you ready?

How Owners & Managers Can Turn a CSR's Service Mindset into an Agency Accelerator - Continued
Presenter: Sheldon Snodgrass • Approved for 3 hours of IN CE (starts at 9:00 a.m.)

Long Term Care Insurance - What It Is & What It Isn't
Presenters: David Berman, Mary Ann Hack & Rebecca Vaughan • Approved for 1.5 hours of IN CE

The objective of this session is to help educate individuals on Long Term Care Insurance. Topics covered include: What is LTC Insurance? How does it interact with Medicare & Medicaid? And why is it important to understand it and purchase it?

12:00 p.m. - 1:30 p.m.

Keynote Lunch: Mine Your Acre of Diamonds
Presenter: Mike Stromsoe

Sponsored by: Progressive

Mike Stromsoe is an agency owner who's passion is teaching and inspiring people who want to be taught and inspired. During this keynote speech, Mike will show you how to "Mine Your Acre of Diamonds". He believes that the easiest and quickest sales to make are to your current clients, the best referrals come from your current clients, and the highest profits come from retaining (yes, you guessed it)… your current clients.

1:30 p.m. - 3:00 p.m. | Concurrent Sessions

Ethics: For More Than Just Insurance
Presenter: Matt Moore • Pending 3 hours of IN Ethics CE (ends at 4:30 p.m.)

Why Ethics? Is Ethics important in insurance? This course outlines the origin and philosophy of both insurance and Ethics, how Ethics relates to the law, and how we face ethical dilemmas every day. Using modern examples, we'll examine what it means to "do the right thing".

How to Harness the Power of Habits
Presenter: Sheldon Snodgrass • Approved for 1.5 hours of IN CE

Changing our outcomes, means changing our behaviors. This session will focus on a three-part method to strengthen the habits that serve us and replace the ones that don't. Attendees will learn how to educate their customers so they have an improved understanding of insurance in a way that it becomes habit.

3:00 p.m. - 4:30 p.m. | Concurrent Sessions

Ethics: For More Than Just Insurance - Continued
Presenter: Matt Moore • Pending 3 hours of IN Ethics CE (starts at 1:30 p.m.)

How Can I Communicate Value When All They Care About is Price?
Presenter: Sheldon Snodgrass • Approved for 1.5 hours of IN CE

This eye-opening session will help you consistently and comfortably transition most inbound, service tasks into sales asks without the risk of sounding pushy. Moreover, when customers call to complain about a price increase, you will be able to quickly and convincingly explain why they may be better off sticking with their current policy before wasting your time price-shopping for them and then reaching the same conclusion. Not only will this session help you reduce remarketing pressure, but you will also learn how to handle virtually every customer objection to any type of sales ask with grace and ease.