

PIA of Indiana's 2021 Annual Convention

Professional Development Schedule & Course Descriptions

Thursday, May 6th

9:00 a.m. ~ 10:30 a.m. ~ Opening Session

Agent of the Future

Presenter: Chris Paradiso • 1.5 hours of IN CE

Sponsored by: Indiana Farmers Insurance

Are you ready to make sure you will be an agent of the future? Agents who embrace technology, improve the customer experience. This results in customers becoming more educated regarding their insurance needs and gaining more access to their insurance information and documents. We will also discuss how technology can play a large role in professional liability and E&O coverage for an agent.

10:30 a.m. ~ 12:00 p.m. ~ Concurrent Sessions

How to Attract New Business with Technology

Presenter: Chris Paradiso • 1.5 hours of IN CE

Sponsored by: Arlington/Roe

Technology can help agents attract new business to their agencies. The technology platforms discussed in this session can be used to educate prospects on coverages and the best options available for their individual needs. The benefits of using these platforms include improved communication and service with prospects, resulting in increased likelihood that they will become customers.

The Business Building Challenge

Presenter: Jack Klemeyer • 1.5 hours of IN CE

As a producers, you need to have strategies in place if you want to increase sales. This session will help you develop a meaningful and actionable plan to contact existing clients and prospects. You will gain the tools necessary so that during your outreach, you will be able to ensure they have the proper coverage for their individual risks.

Certificates of Insurance and Additional Insureds

Presenter: Todd Davis • 1.5 hours of IN CE

This session is designed for a wide range of insurance personnel, including agency staff and company employees. Topics covered in this session include: the use and administration of Certificates of Insurance as evidence of risk transfer; discussion of how Additional Insureds integrate into policies; and professional obligations and responsibilities of insurance agencies.

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 Power of Brand

Presenter: Chris Paradiso • 1.5 hours of IN CE

Sponsored by: *Progressive*

In this session, Chris is going to show agents how to develop and use their brand as a marketing tool for their agency. By having a cohesive brand, agents will be more likely to be seen, followed, and be able to make a difference in the public's understanding of insurance. Areas covered include: getting to know your customers, how to showcase insurance products, and how to develop your voice when talking about your products.

Turning Adversity to Advantage

Presenter: Jack Klemeyer • 1.5 hours of IN CE

Sponsored by: *Burns & Wilcox*

The goal of this session is to help the agency producer see, develop, and understand practical ways to turn adversity into advantage while helping others around them, their staff, their prospects, and their customers do the same. In doing this, communication with staff, prospects, and customers will be improved which in turn will improve customer service, reliability, and the ability to properly educate customers on appropriate coverages for the risks they are exposed to in life and business.

Basics of Errors and Omissions Loss Prevention

Presenter: Todd Davis • 3 hours of IN CE (ends at 5:30 p.m.)

Sponsored by: *Grinnell Mutual*

Managing consumer risk transfer in today's litigious business environment can be challenging. This session covers topics ranging from basic daily routines, tasks associated with all stages of the insurance client life cycle, and the increasingly difficult agency task of working with clients, carriers, and third parties. The course has been developed using actual case histories from years of E&O claims brought against agents and agencies. The material presented will provide specific techniques that assist agencies in adopting procedural changes to avoid mistakes that result in unnecessary and costly lawsuits. Included are actual case studies from the past 60 months and specific recommendation from experts in defending agencies against claims of improper insurance sales and servicing.

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

New Technology

Presenter: Chris Paradiso • 1.5 hours of IN CE

New technology is constantly being developed and marketed to agents. This session will help agents have a better understanding of new technology available to them and their agencies. These platforms are often designed to help save agents time so they can focus on their clients and bringing in new business.

Developing Your Team

Presenter: Jack Klemeyer • 1.5 hours of IN CE

This session will help agency owners grow their team by gaining an improved understanding of different personality types. During this session, attendees will learn how to identify different personality types based on behavioral and language markers. This will increase collaboration as a team, which will result in improved customer service and communication with clients and prospects.

Basics of Errors and Omissions Loss Prevention - Continued

Presenter: Todd Davis • 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

Sponsored by: Pekin Insurance & Roush Insurance Services

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 7th

9:00 a.m. ~ 10:30 a.m. ~ Concurrent Sessions

Boomers and Their Insurance Needs

Presenter: Lisa Worley • 1.5 hours of IN CE

Boomers have a wide variety of insurance exposures that can make insuring them more challenging than other generations. During this session, attendees will learn how to make sure that their customers, who are considered baby boomers, have the proper insurance coverage for their needs.

How Owners & Managers Can Turn a CSR's Service Mindset into an Agency Accelerator

Presenter: Sheldon Snodgrass • 3 hours of IN CE (ends at 12:00 p.m.)

Sponsored by: CRC Group

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.

2021 Legislative Update

Presenters: Marty Wood & Jon Gentile • 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 as well as 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 Business of Customer Service and Asset Protection

Presenter: Lisa Worley • 1.5 hours of IN CE

Meeting and exceeding customer expectations, responding to any and all feedback, and providing the trust and expertise they need and expect are what differentiates independent agencies from their competitors. This session will help insurance professionals put customer service at the forefront of their operations.

How Owners & Managers Can Turn a CSR's Service Mindset into an Agency Accelerator - Continued

Presenter: Sheldon Snodgrass • 3 hours of IN CE (starts at 9:00 a.m.)

10:30 a.m. ~ 12:00 p.m. ~ Concurrent Sessions Continued

Cyber Liability Basics

Presenters: Jennifer Gorman & Chad Guyer • 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. ~ 1:30 p.m.

Keynote Lunch: Mine Your Acre of Diamonds

Presenter: Mike Stromsoe

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 in the Trenches

Presenter: Lisa Worley • 3 hours of IN Ethics CE (ends at 4:30 p.m.)

Sponsored by: Roush Insurance Services

The goal of this session is to strengthen the ethical foundation of insurance professionals. As professionals, we have an ethical duty to our customers, carriers, and the industry. This course will discuss the dilemma of professionalism, case studies, and how to improve ethics in the workplace.

How to Harness the Power of Habits

Presenter: Sheldon Snodgrass • 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 in the Trenches (Continued)

Presenter: Lisa Worley • 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 • 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.