

# PIA of Indiana's 2021 Virtual Convention

**Wednesday, May 5th**

**9:00 a.m. - 10:30 a.m.**

## **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.

**11:00 a.m. - 12:30 p.m.**

## **Turning Adversity to Advantage**

Presenter: Jack Klemeyer • 1.5 hours of IN CE

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.

**1:00 p.m. - 2:30 p.m.**

## **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.

**Thursday, May 6th**

**9:00 a.m. - 12:00 p.m.**

## **Basics of Errors and Omissions Loss Prevention**

Presenter: Todd Davis • 3 hours of IN CE

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.

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

## **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.

**Friday, May 7th**

**9:00 a.m. - 12:00 p.m.**

## **Ethics in the Trenches**

Presenter: Lisa Worley • 3 hours of IN Ethics CE

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.