PIA OF INDIANA'S 2020 ANNUAL CONVENTION

Professional Development Schedule & Course Descriptions

Thursday, May 14:

9:00 A.M. - 10:30 A.M. - OPENING SESSION

Artificial Intelligence and Big Data and It's Role in Your Agency

Presenter: Chris Paradiso • 1.5 hours of IN CE

Sponsored by: Liberty Mutual/Safeco

This session will help agents learn how to use Artificial Intelligence and Big Data in their agencies. Both AI & Big Data can be used as tools to help agencies and agents. When implemented correctly, they can be used to increase agency revenue.

10:30 A.M. - 12:00 P.M. - CONCURRENT SESSIONS

Getting Your Agency Social

Presenter: Chris Paradiso • 1.5 hours of IN CE

Sponsored by: Grinnell Mutual

This session will help agents get a better understanding of how to use social media as a tool for their agency. We will look at different social media platforms and how other agencies around the country are using them to build brand awareness and to grow their agency. Topics covered include: different types of content and how to use them, how to use video, and tools that are available to help with social media marketing.

Tax Implications of Owning an Agency

Presenter: Jon Persky • 1.5 hours of IN CE

No one wants to pay more in taxes than they are legally obligated to. This class will discuss how entity structure and how you pay yourself can impact you today as well as when you eventually sell your agency.

Usual Claims You Never Want to See

Presenter: Todd Davis • 1.5 hours of IN CE

This is course focuses on unusual insurance claims and situations for both Personal Lines and Commercial Line policies. The course introduces the participants to emerging claim scenarios based on rapidly changing exposures in the marketplace from things like the gig economy, alternative power sources, hoarding, biohazards, crime scene claims, mold, and technology issue.

12:00 P.M. - 2:30 P.M.

Annual Tradeshow & Lunch

Free for all Agency Staff!

Walk through the Tradeshow and visit all 63 booths, grab lunch from the various food stations, and network with fellow agents and company representatives from around the state.

2:30 P.M. - 4:00 P.M. - CONCURRENT SESSIONS

How our Agencies' Retention is Centered Around Data Scientist

Presenter: Chris Paradiso • 1.5 hours of IN CE

The goal of this session is to show agents how to use data to improve their retention rates. By looking at the data, insurance professionals can learn how to provide better service to their customers which will led to increased retention.

Finding (and Hiring) the Right Employees

Presenter: Jon Persky • 1.5 hours of IN CE

Sponsored by: Burns & Wilcox

With the low unemployment rate, it is a challenge to find quality candidates. Accurate job descriptions, employment applications, reference checking, testing, and good interview techniques will help you hire the right candidate the first time.

E&O: It's Not My Fault

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

Sponsored by: Arlington/Roe

This course consists of discussions related to the evaluation of insurance risks, the role of an insurance intermediary in the transfer of risk from consumer to insurance carrier, and the risks associated with professional obligations, fiduciary duties, and responsibilities imposed by courts, laws regulating the sale of insurance, and peer/industry standards. Topics covered include common mistakes made in processing both Personal Lines and Commercial Lines policies. Through each step of the program, participants will be given specific procedures to implement that will help avoid the risk of being sued through claims of Errors and Omissions.

4:00 P.M. - 5:30 P.M. - CONCURRENT SESSIONS

The Power of Brand

Presenter: Chris Paradiso • 1.5 hours of IN CE

The goal of this session is 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 a getting to know your customers, your products that you are selling, and how to develop your voice when talking about your products.

Agency Staff Productivity

Presenter: Jon Persky • 1.5 hours of IN CE

Is your agency understaffed, overstaffed, or properly staffed for the amount and type of business you write? This class will discuss this topic as well as how retention and the type of accounts you write can impact your agency's profitability.

E&O: It's Not My Fault (continued)

5:30 P.M. - 6:30 P.M.

Networking & Cocktail Reception

Sponsored by: Grinnell Mutual

Join us for a snack and a drink after sessions end for the day.

7:00 P.M. - 10:00 P.M.

Thursday Night Social @ Saint Joseph Hall

Sponsored by: Madison Mutual, Pekin Insurance & Selective Insurance

The fun isn't over yet! Join us for dinner, drinks, and even more networking at Saint Joseph Hall. 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 15th:

9:00 A.M. - 10:30 A.M. CONCURRENT SESSIONS

CGL and the Contractor: Traps & Tricks

Presenter: Ted Kinney • 1.5 hours of IN CE

Sponsored by: Western Reserve Group

This course addresses the Commercial General Liability coverage form and the possible gaps that exist for contractors. Included in this session will be a discussion of the insurance and non-insurance remedies for the coverage gaps. Emphasis will be on increased awareness, E&O loss reduction, and increased service to clients.

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: Markel Specialty Commercial

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.

2020 Legislative Update

Presenters: Marty Wood • 1.5 hours of IN CE

Sponsored by: Progressive

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 Insurance Agent's Standard of Care: What is Your Legal Duty to Your Insureds?

Presenter: Ted Kinney • 1.5 hours of IN CE

In many E&O cases, the insurance agent's standard of care is the determining factor. However, there is a difference between the standard of care and "best practices". This course will discuss the basic standard of care, factors that could create a higher standard of care, and course cases that have changed the Indiana standard of care.

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

10:30 A.M. - 12:00 P.M. CONCURRENT SESSIONS CONTINUED

Cyber Liability Basics

Presenters: Lisa Micciche & David Rupnow • 1.5 hours of IN CE

This course discusses the risks to small businesses and nonprofits related to cyber attacks, and 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: Who Needs 'Em

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

Sponsored by: Roush Insurance Services

The topic of ethics is often discussed in professional circles. In fact, many states have a requirement that insurance agents take ethics courses. This course discusses the fundamentals of ethical responsibilities and asks the question – "can ethics be taught?" The course also deals with the legal ramifications of unethical behavior.

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 that 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: Who Needs 'Em (Continued)

How Can I Communicate Value When All They Care About is Price?

Presenter: Sheldon Snodgrass • 1.5 hours of IN CE

Sponsored by: Indiana Farmers

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 program 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.