

# PIA of Indiana's 2019 Annual Convention

## Professional Development Schedule & Course Descriptions

### Thursday, May 9:

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

##### *Delivering Value in a Price Driven Marketplace*

Presenter: John Fear

1.5 hours of IN CE approved

The insurance industry's greatest obstacle to overcome is the ignorance of consumers as to how their insurance coverage protects them in case a claim needs to be filed. Consumers are bombarded with a never-ending flow of messages about "how much they can save" while there is almost no discussion of the value of the product they are choosing to protect a life-time of assets. This course focuses on the development of those client needs, the professional delivery of the insurance proposal and the development of the long-term relationship with the insurance consumer and industry partners.

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

##### *Developing Client Advocates through Exceptional Customer Service*

Presenter: John Fear

1.5 hours of IN CE approved

Independent agents need to initially capture and then maintain their client's attention to be able to articulate the value of having insurance coverage that will protect their personal and business assets while, at the same time, focusing on minimizing the agency's Errors & Omissions exposure. Exceptional customer service can then be delivered through the coordination of the individual professionalism of each of the agency's staff and the deliberate and systematic culture supported by the agency's management team.

##### *Developing & Retaining Your A-Team*

Presenter: Kim Busse

1.5 hours of IN CE pending

Attendees will learn the key elements of employee retention starting with realizing and maximizing your staff's potential through engagement and development. Specific tactics such as leadership preferences, development preferences and ways to identify development opportunities will be revealed both from class discussion and instructor led solutions. Because you're doing more with less, mentoring, coaching, motivating, managing and continuous training are critical employee retention elements. In this session, participants will learn a development and retention process which is easily implemented.

##### *Understanding Bonds*

Presenter: Tim Frank

1.5 hours of IN CE pending

Bonds are a great way for any agent to get their foot in the door. This session will give attendees the knowledge to better serve their customers by being a one-stop shop. Topics covered in this session include the different types of bonds, bond rates, and underwriting requirements.

##### *Group Long-Term Disability Solutions for Highly Compensated Employees*

Presenter: Zach Wilding

1.5 hours of IN CE pending

This session will introduce producers to key LTD coverage provisions and how most to correct "Reverse Discrimination" – that is, the notion that Highly Compensated Employees (HCEs) have coverage limitations imposed upon them that can be corrected resulting in better LTD contracts with broader coverage specifically designed for HCEs.

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

*Annual Tradeshow & Lunch*

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.

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

*Drones and the Insurance Exposure*

**Presenter: Mark Reilly**

**1.5 hours of IN CE approved**

This session will look at the huge surge in the use and ownership of unmanned aircraft. The exposures, both personally and commercially, will be reviewed. We will look at how the insurance policy responds to Drones from Commercial and Personal Liability coverage to Inland Marine and Property forms. Participants will learn good common sense risk management ideas that can be share with their clients.

*How Empowered Employees Impact the Client Experience*

**Presenter: Kim Busse**

**1.5 hours of IN CE pending**

*Sponsored by: Burns & Wilcox*

According to a Gallup poll, “68% of customers leave a company because of the attitude of indifference from an employee”. Empowered employees have an increased sense of ownership in their organization. Micromanagement can limit an employee’s ability to think about boosting customer service, perhaps even stifling the urge to help. Learn what people need to feel empowered toward providing the ultimate customer experience.

*E&O Mock Trial: Misrepresentations on Insurance Applications*

**Presenter: Casey Stafford**

**3 hours of IN CE pending (ends at 5:30 p.m)**

During this Mock Trial session, the topic of misrepresentation on an insurance application will be addressed. Learn about the insurance agency’s perspective and involvement when these types of claim occur. Attend this session and see if you can figure out which way the case will end.

*Veterans Healthcare Benefits & Options*

**Presenter: Mike Jones**

**1.5 hours of IN CE pending**

Learn how veterans qualify for VA benefits, TRICARE, and CHAMPVA. Proper benefits analyst can help veterans with their benefits and achieve their best health.

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

### *The Sharing Economy and Auto Insurance*

Presenter: Mark Reilly

1.5 hours of IN CE approved

This session will include discussions of the exposures presented from the sharing economy from the Transportation Network Company (TNC) exposure to the individual marketplace for short term rental of licensed vehicles. We will discuss how to identify the exposures and incorporate that into agency procedures, the laws and the policy. This session will help agents know how to tell when there is coverage and when there are gaps.

### *Conflict Resolution for Teams*

Presenter: Kim Busse

1.5 hours of IN CE pending

In one corner, the usually mild-mannered account manager, in the other, the sometimes overbearing sales rep. Today's workspaces are made up of a diverse group of individuals. You have different generations, backgrounds, educations, and personalities. And when the melting pot starts to boil, conflicts bubble over. If you don't turn down the heat fast enough, conflict starts compromising all parts of the business; office morale declines, engagement becomes disengagement, and worse, your customers might get burned. Conflict is inevitable, it can even be good, so learning how to work through it productively is the key to smooth operations, better office relationships and professional growth. Learn how to work through conflict by understanding behavior and using it to your advantage. Boxing gloves not required!

### *E&O Mock Trial: Misrepresentations on Insurance Applications (continued)*

### *Indiana Long Term Care Insurance Market Update*

Presenter: Chris Barnhouse

1.5 hours of IN CE pending

This session will cover Long Term Care insurance products currently available in Indiana as well as market trends and pending regulatory changes.

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

### *Networking & Cocktail Reception*

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

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## 6:30 p.m. - 9:30 p.m.

### *Thursday Night Social*

The fun isn't over yet! Join us for dinner, drinks, and even more networking. If you attended last year, you know this isn't something you want to miss. **Separate registration required.**

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## Friday, May 10:

### **9:00 a.m. - 10:30 a.m. Concurrent Sessions**

#### *How to Turn Technical Knowledge into Dollars*

Presenter: John Fear

3 hours of IN CE approved (ends at 12:00 p.m)

This session, provides valuable tips on consumer expectations, account development and retention, and interpersonal communication skills in an interactive and fun atmosphere. Agency sales managers, account managers, producers, internal support staff and company marketing personnel all benefit greatly from this session.

#### *The Benefits of Mastering LinkedIn*

Presenter: Steve Anderson

1.5 hours of IN CE pending

LinkedIn, the leading social platform for professionals, now has over 93 million members in the U.S. The networking, referral, and prospect research opportunities are vast for insurance agents and brokers—if they take advantage of all LinkedIn has to offer. At a minimum, every salesperson in your organization should have a fully completed LinkedIn profile. We strongly suggest that every individual in your office also have a complete profile. This session demonstrates the benefits from an active LinkedIn presence and demonstrates how to get started.

#### *2019 Legislative Update*

Presenters: Marty Wood & Jon Gentile

1.5 hours of IN CE pending

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.

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

#### *How to Turn Technical Knowledge into Dollars (Continued)*

#### *How to Sell & Service Small Commercial Business*

Presenter: Steve Anderson

1.5 hours of IN CE pending

Small commercial business can be one of the most profitable books of business for an agency—if they create the right strategy to reduce the cost of acquiring this type of low revenue business. They also need to streamline and automate ongoing servicing activities. This presentation details how single-purpose websites can be effectively used to create niche markets for generic main street business. Technology, effectively implemented, can provide the agency with the ability to provide quality customer service at a reduced cost.

#### *EPLI Policies: Practical Considerations for Preventing and Defending Employment Claims*

Presenter: Mark Stamelos

1.5 hours of IN CE approved

Between frequent media coverage of big settlements and the ease with which an employee can take action, employers are more vulnerable than ever to harassment, discrimination and retaliation claims. Employment Practices Liability Insurance (EPLI) covers companies against these types of claims that are filed by employees, former employees and employment candidates regarding their employment relationship with their employer. An employer can use an EPLI policy to cover expenses involved in defending against claims or lawsuits related to employment (regardless of the outcome) and EPLI provides for indemnification of the employer if is settled or a verdict is obtained against the employer. This presentation will discuss EPLI coverage generally, the types of claims its covers and the benefits to employers to having EPLI coverage in this litigious environment.

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

*Keynote Lunch*

**Presenter: Gary Brackett**

Come listen to how Gary Brackett went from being a walk-on in the NFL, to Team Captain and Super Bowl Champion to the owner of a growing restaurant franchise, Stacked Pickel, in Indianapolis. His story is one you can't miss!

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

*Managing E&O Exposures in a 24/7 World*

**Presenter: Steve Anderson**

**1.5 hours of IN CE pending**

Technology plays a vital role in effectively managing today's insurance agency. The same technology also presents risks and challenges that need to be addressed and managed to minimize errors and omissions claims. This seminar will explore various techniques being used by agencies today, and the E&O challenges these technologies create. Email, electronic documents, remote workers, interactive websites, company and agency service centers, and client self-service are some of the topics tackled. Specific recommendations on how to reduce an agency's exposure to potential problems are provided. These issues are not going away. Attend to learn how to protect your organization.

*Ethics in Action*

**Presenter: Tom Ryan**

**3 hours of IN Ethics CE approved (ends at 4:30 p.m.)**

This course will teach ethical principles and how they relate to the insurance industry. Case studies will be used to illustrate these principles of ethics. After this course the attendee will have a better understanding of ethical issues and values.

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

*The New Sales Manager*

**Presenter: Steve Anderson**

**1.5 hours of IN CE pending**

Creating a stream of new prospects interested in your products and services will be key to surviving and thriving in the continued soft economic environment. Just hiring more producers is an outdated strategy. Agencies must get better at understanding and implementing marketing programs that generate leads—and the Internet must be an essential part of this plan. "The New Sales Manager" will help you understand these new marketing concepts and responsibilities.

*Ethics in Action (Continued)*