

# Out of SITE

## Society for trainers and educators maintains high standards, low profile for insurance professionals

SITE (the Society for Insurance Trainers & Educators) wants to change its reputation as the best organization that people don't know about.

Founded 50 years ago to enhance the results of trainers and educators in the insurance industry, SITE has evolved during its first half century into a vital resource for industry professionals, ranging from human resource managers to directors of training and continuing education. SITE is the only organization dedicated exclusively to education and training in the insurance industry.

"SITE membership is made up of trainers at every level of the insurance industry," explained Sandy Masters, marketing director of the CPCU Institute in Arizona. She currently serves as regional vice president for SITE with responsibility for member involvement.

"Misery loves company," she said with a smile. "SITE is an outstanding business network in addition to a social circle filled with people who share the same challenges and are willing to share insight into better methods to communicate our very important message."

As regional director of the CPCU Institute, Masters partners with CPCU chapters in 13 states and other professional associations, solidifies relationships with academic institutions, represents the Institute at trade shows, identifies new growth opportunities, and contributes to the organization's product development agenda.

Masters listed the SITE web site, its exclusive Train-the-Trainer program, and its annual conference as the highlights of what the organization provides to individual members and corporate sponsors.

The annual conference provides members with an unrivaled opportunity to network with top professionals,

attend seminars, and participate in concurrent workshops focused on real-world topics. Side trips focus on the aspects of risk management.

The 2006 conference in New Jersey included a visit to Ground Zero in Manhattan. In what could have been an overwhelming and emotional experience, guest experts focused on the challenge of understanding risk manage-

*"SITE has given me opportunities to go far beyond what I could have learned (at Allstate) and pass that knowledge on to students in the classroom."*

ment for the hundreds of professions represented by workers at the site of the World Trade Center.

Incoming President Karen Scott of Allstate Insurance in Northbrook, IL, has been a member of SITE for five years and just completed her third year as a contributor to the organization's governing board. As a professional trainer, she has been witness to SITE leading the transition into the virtual classroom.

Scott said SITE has allowed her to step away from daily responsibilities and look at education from a Best Practice standpoint.

"Conferences, regional meetings, and local seminars give members the chance to examine industry trends. Not from a competitive point of view, but as colleagues who seek results for our investment of training and dedication to the industry," said Scott. "I have tremendous control in my present position. But SITE has given me opportunities to go far beyond what I could have learned (at

Allstate) and pass that knowledge on to students in the classroom."

Scott currently heads Allstate's development of online and blended learning solutions that support insurance and financial services product knowledge, compliance, enterprise applications, and initiatives. She is also the senior manager who supports the company's enterprise learning management system. Prior to accepting her current position with Allstate, she worked for three major telecommunications companies and in private consulting.

Like other members of the SITE board, Scott noted the value of impromptu social gatherings in conjunction with formal meetings as an opportunity to learn from peers within the industry. She said SITE has provided immediate and concrete benefits for everybody from new hires to seasoned executives of Allstate.

She went on to say that involvement on the SITE board has given her even greater exposure to experts from other organizations, as well as vendors who have provided stimulus to improve the quality of her classroom presentations.

Cynthia Davidson is one of those vendors. She is outgoing president of SITE and currently serves as vice president of insurance product management for Kaplan Financial.

Davidson has worked in insurance education publishing for 22 years. In addition to her duties with SITE, Davidson currently serves on the California Insurance Department's Curriculum Advisory Board and the board of directors of the Insurance Regulatory Examiners Society Foundation (IRESF).

As a vendor and busy mother, Davidson initially hesitated when invited to join SITE by one of her largest clients in 1997.

Her decision to join was a fortunate one based on the fact that SITE members are not simply individuals; they also represent the majority of corporations that are critical to fundamental educational elements of the insurance industry.

Davidson and many of her colleagues have used the unlimited access to experts through the SITE web site when faced with content and questions regarding issues of compliance.

“SITE members are always willing to share their expertise with each other and that is one of the most valuable benefits of membership,” she summarized.

She said the objective viewpoints available through the SITE resource bank have been especially useful in creating solutions for states where the Department of Insurance either creates new training regulations or implements new course requirements that impact agent education.

Membership in SITE is open to employees of virtually every department of an insurance company and many of their suppliers. The organization is dedicated to providing performance improvement opportunities to members through programs, networking, and services.

Before submitting an application to join SITE, prospective members are asked to outline their own expertise that can be added to the combined knowledge base available to the membership. Both corporate and associate members are encouraged to share resources through collaboration within the insurance industry, as well as techniques that enhance educational and professional development.

Above all, according to Executive Director Lois Markovich, SITE promotes professionalism and integrity.

Although Davidson is a respected expert in many insurance related fields, she

emphasized that SITE has also helped her grow as a professional. She noted her personal experience from the Train the Trainer workshops that have given her the confidence to speak in front of large groups.

“It’s very odd that I was given responsibility for classroom training (at Kaplan Financial) although the largest audience I had ever spoken to before was my daughter’s Brownie troop,” she said with a smile. “Little girls can be the world’s toughest audience. SITE gave me the opportunity to learn the importance of body language, gestures, eye contact, and all the factors that go into making a positive impression to a group.

“SITE has made a major impact on my troop of Girl Scouts. The proof is in the number of cookies we sold this year.”

*For more information about becoming a member of this not-so-secret organization, contact Lois Markovich at (415) 621-2830 or ed@insurancetrainers.org*

## Regional meetings can add some more zing to the SITE experience

In addition to the comprehensive nationwide support from industry mentors, educational professionals who specialize in insurance are drawn to the regional SITE meetings for the camaraderie of colleagues, because those individuals can truly understand the challenges that confront them on a daily basis.

For Phyl Turrentine, the learning and development leader for the Texas Zone for State Farm Insurance in Austin, TX, the regional meetings of SITE provide her with the opportunity to meet trainers in her area who are willing to share fresh perspectives on similar issues that trainers face at different companies.



“I always learn something new at these meetings and believe the informal structure enhances the free exchange of ideas,” said Turrentine. “We also decide on the agenda for the next meeting, so we know in advance that the topics covered will be relevant and timely.”

Turrentine has been a member of SITE for more than three years. She describes the organization as an empathetic group of professionals helping other professionals.

For example, at a meeting held in the State Farm offices in Austin in early March, regional delegates discussed methods to retain clients after a major loss, knowing where to focus a company’s training resources, and the ability to identify future super-star performers.

In a note to Turrentine, Kathryn A. Fastner with Education Segue wrote, “As a trainer, we all know how difficult it is to meet the expectations of our peers—great job. I especially enjoyed the Effective Facilitation Techniques and have selected three of the methods to adopt in my training programs.”

Turrentine has been with State Farm for more than 20 years, starting out in the fire and casualty claims department, where she met her husband. The couple has two sons, one daughter, and a brand new grandchild. She loves to travel, listen to live music, and take part in organized cycling events. Phyl also claims to be a wine collector and is an active member of both the Lance Armstrong Foundation and the Susan Komen Foundation in the fight to find a cure for cancer.

She has been honored numerous times during her two decades at State Farm, but specifically for her work as a litigation specialist and for her dedication in coordinating efforts during storm and catastrophe coverage.

“The benefit of being a member (of SITE) is that it allows me to work on my personal development, so that I can strive to be a better trainer,” she summarized. “As the director of the Texas region, I am afforded the opportunity to help others with their personal growth.”

Individual meetings are held periodically in each of the five SITE regions, according to the society’s Executive Director Lois Markovich. She explained that the local gatherings are held as many as five times per year, based on both geography and the amount of information to disseminate.

“Many of the meetings are held with members together in one room, but they can also be teleconferences or web conferences,” said Markovich. “The meetings are posted on the SITE web site as soon as they are scheduled. Most fill up in very short order.”

Recent Train-the-Trainer seminars were held in February in Dallas; in Illinois during March; and in Malvern, PA, in April.

The SITE web site is: [www.insurancetrainers.org](http://www.insurancetrainers.org).