

# Twice as Nice

## 2nd Annual Conference Flies to the East Coast and Soars Even Higher

BY LEI ANN DUNFORD, PROJECTS MANAGER, III

Even after the success of the *1<sup>st</sup> Annual Claims Education Conference* in Sonoma, California, many were skeptical about it being repeated. The conference managers hung tight to their promise of no boring panel discussions, no unskilled presenters, and no B.S.

With an astonishing increase of more than 50 percent in attendance, mostly attributed to word of mouth, the conference managed to exceed the expectations of the returning and new attendees.

*“Excellent - exceeded my expectations!”*

— Donna Ince,  
Royal & Sun Alliance Canada

### How Did the Conference Exceed Attendees’ Expectations?

Ask and ye shall receive. Yes, sometimes asking for feedback can be a little scary. But the Claims Education Conference committee was willing to put it out there to all of last year’s attendees. They received a lot of great feedback to improve their success. Improvements from the first year included:

- Separate workbooks for each session
- Conference binder to file each session workbook

- More activities
- Larger rooms
- Location closer to Airport
- More breakout sessions for managers.

Like with the first year, you still couldn’t find any boring panel discussions or PowerPoint snooze fests. No sleepy head bobbing was seen. They actually strived to keep everyone awake by presenting meaningful and applicable claim training.

### How Was the Training Presented?

Professional, certified instructors conducted the sessions, teaching topics that directly related to the claim industry and/or management areas. All instructors of the conference were professional trainers of International Insurance Institute, Inc. Experienced instructors presented three-hour condensed versions of the most-requested courses offered by International Insurance Institute, Inc. Attendees ended each day with a compilation of newly learned skills they could immediately implement and use.

### Exhibitors and Sponsors Join the Sessions

Unlike most conferences where the ex-



Dave Vanderpan, Dir. of Claims Training for III, engaged the group with energy and provided skills that could be used immediately.

hibitors and sponsors sit around during the sessions, most decided to join the sessions and were blown away by how valuable the information was. Exhibitors expressed appreciation for providing an atmosphere that allowed them to meet and speak with each attendee.

*“The availability of training managers was a tremendous advantage for this conference.”*

— Chuck Parker, Vaisala, Inc.

The Claims Education Conference could not function without the support and attendance of the wonderful sponsors and exhibitors. The conference staff has continued to develop ways to provide interaction and support of the companies who graciously give their monetary support, time, and effort to make this conference a success each year.

*“The event earns high marks for how the staff supported & promoted exhibitors. Your efforts were genuine & helpful without being “salesy.” As exhibitors, we were made to feel valued & an integral part of the event rather than an afterthought.”*

— Jeff Schultz, Certified Restoration  
Dry Cleaning Network



Lisa Ferrier, Gretchen Gibbs, Ann Van & Lei Ann Dunford welcome guests at the registration table.

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Dave Vanderpan, Ken Sanders, Ken Bohn and Lei Ann Dunford of III show off their skivvies after performing their 99 Second Fun talk skit as they danced to "I'm Too Sexy"



Pat & Pat of Albers Alnet Language & Transportation Services perform a great skit during the 99 Second Fun Talk, which allows exhibitors and sponsors exactly 99 seconds to sing, dance, perform a skit, or do anything they can to entice attendees to stop by their booth.

## Breakout Sessions Impressed Attendees with Presentation and Content

The Claims Education Conference had one main focus. It was to provide useful, claim-related training in a fun and real-life manner by professional claim instructors. The breakout sessions this year ranged from soft-skill to technical subjects. Once again, separate adjuster and manager tracks were offered to provide each attendee with a wide variety of subjects from which to choose.

*"Great information that can be used easily in everyday circumstances."*

— Lori Gibowski, West Bend Mutual

## Adjusters Track Sessions

### *Awesome Claims Customer Service for Adjusters*

Everyone would like to make their job easier and improve their customer service skills. This session offered insight as to how this can be successfully done. Areas focused on were:

- **Understanding the basics** of providing high quality customer service. The fact that customer service is a claim person's main job is stressed.
- **Learning proper telephone techniques.** Focus is on how to manage

phone calls and how to reduce the number of incoming and outgoing calls.

- **Gaining insight** into understanding what individual customers need. Listening, instead of talking and assuming you know what the customer is going to say or ask, is key.
- **Managing customer's perceptions.** We have control over a customer's perception by the way we say things. When we use "victim phrases," such as "you're going to have to be reasonable," the customer takes on a defensive attitude.

### *Negotiating with Attorneys*

This session focused on how to put yourself in the best position for a confident and strategic negotiation by building a solid foundation of knowledge and planning. Some of the foundation strategies include:

- **Importance of researching** the attorney. Understanding the attorney's settlement characteristics. Focus is also placed on their experience in the courtroom.
- **Understanding the claimant** is also important. You need to know as much as possible as to their background and issues they are claiming as factors to the claim.
- **What's the injury** being claimed? Performing in depth research as to the injury and any permanency can put the adjuster in a great negotiating position. Because of time constraints, some attorneys do not understand their client's injuries and treatment.

### *Empathy Training: Gaining Credibility with Customers Through Understanding and Listening.*

This session involved improving your communication by enhancing listening skills and developing empathy abilities. Skills are taught by:

- **Practice exercises,** role-plays and real life scenarios to improve listening skills.
- **Learning how** to take in greater amounts of information and remember more while "hearing between the lines."

**Effective Recorded Statements**

The goal of this session was to increase the effectiveness of recorded statements by developing proper outlining and strategy skills. No matter how experienced a claim person may be, obtaining a clear, concise and legal recorded statement can be a challenge.

Areas focused upon in this session were:

- **The main reason** a recorded statement is needed is to preserve evidence.
- **How to avoid** asking leading questions.
- **Being properly prepared** as the statement taker and preparing the interviewee.
- **Keeping control** of the statement.

**Manager Track****Awesome Claims Customer Service for Supervisors and Managers**

This session was brought back by popular demand! It focuses on how and why management teams need to be able



Phyl Turrentine of State Farm makes note of skills presented in class.

to provide guidance to their staff when it comes to recognizing and delivering outstanding customer service. Some specific topics covered were:

- **Proper ways** to handle the telephone.
- **Effective** Listening.
- **Managing** objectives.
- **Delivering** bad news.

**More Time Management Skills for Claims**

This session was a continuation from last year's conference and included real-life scenarios specific to issues that claim managers face during their day-to-day operations. Managers learn how to use issues during problem-solving exercises to focus on result-oriented activities. Some skills taught included practical methods of improving time management. (How ironic: So much info was packed into this session, they ran out of time!)

**Motivating Your Claim Team**

This manager-specific session was designed to help managers get their staffs to work hard and give their best. This is not always easy, given the pressures and strains on adjusters.

Focus was mainly on:

- **Developing** Positive Attitudes.
- **Methods** of Motivation.
- **Concepts** of Leadership.



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- **Approaches** to effectively motivate the claims team.

### *Interviewing Tips to Hiring Great Adjusters*

All claim managers have struggled at some point with developing effective interviewing techniques to identify the characteristics most desirable in the typically successful claim person. To help attendees learn how to recognize certain characteristics the instruction focused on:

- **Making sure** your advertising is casting the right net. Writing effective claims ads.
- **Identifying** opposite characteristic traits. Reliable, dependable, process oriented people are not typically problem solvers and outside the box thinkers. Don’t ask for both.
- **Learning** how to use the “follow up question” format to get to the truth.
- **Identifying** the “Giver” vs. the “Taker.”

*“Terrific overview and useful information for anyone in any business.”*

— Lynn Mogstad, Montana State Fund

### *Ethics and Fair Claim Practices Handling*

Students’ awareness of Ethics and Fair Claim Practices Act Statutes common in most states were increased. This knowledge was applied to real-world claim scenarios to demonstrate the essential steps necessary for good faith claim handling. This subject is a high priority for the whole insurance industry as consequences can be very costly.

### *Basic Presentation Skills: From Remembering to Breathe to Having Fun*

This session taught the basics of proper gesture and eye contact along with the intricacies of persuasive conclusion building. This session included the six-step process for facing the skeptical audience:

- **Make a shocking statement or comment.** The first order of business is to get people’s attention. It doesn’t even matter if it is one the audience agrees with. You can always explain that later. For now, make them want

to hear your followup.

- **Paint a very dismal picture.** Show the audience what will happen if they do not end up agreeing with you. Something bad that has happened in the past, or to someone else, is a good choice. If you want change, show them what happens to people and/or companies that don't change.
- **Show the numbers.** In clear, simple numbers, talk about the problem of staying the course. Try to avoid graphs – everyone knows they lie.
- **Infuriate them.** If you can, demonstrate how totally unfair the past situation has been to them, and how they deserve better! Have the people they have been concerned about been wasting their money? Have the values they hold true been used against them? Have the nice things they have done for mankind been supporting evil? Whatever is, expose it. Show them that you only want to make sure they get what they deserve. (Not you, but THEM. Sure, it makes you better off too, but they shouldn't care about that!)
- **Offer your solution, idea or alternative.** *It is important that you intertwine your ideas with concepts they already hold true. Then demonstrate it as more of a "twist" to what*



Dick Aten and Brian Baker of Cincinnati Insurance are intensely focused on improving their presentation skills along with everyone in the session.

they wanted originally.

- **Demonstrate your concern for doing the right thing.** If it's money they are after, ease their minds that wanting money is okay. If it's honesty they are after, show them your solution, even though painful, might just really be the most honest thing to do. If llamas are what they care about, show them how much better off the llamas will be. Note: The best way to do this is make them think you don't care about doing the right thing, and

then show them that you do!

### ***Managing Change***

Every manager struggles with handling change within their office and organization. Managers are under extreme pressure to not only manage their own reactions to change, but also influencing their staff's perception of change. This session focused on how to rise to the challenge of management changes, office procedure changes, and workload changes.

## **Here are the wonderful exhibitors and sponsors you could find at the conference. They would love to hear from you!**

<b>COMPANY</b>	<b>CONTACT</b>	<b>PHONE</b>	<b>EMAIL</b>
Ford CCRN	Charles Baker	440-478-6361	cbaker4@earthlink.net
D'Brook & Co., Inc.	Tom Donkerbrook	866-785-2966	tdonkerbrook@dbrook.com
Haag Engineering Co.	John Derosa	972-246-3162	jderosa@haagengineering.com
Law Offices of Jan Meyer & Associates, P.C.	Jan Meyer	201-862-9500	jmeyer@janmeyerlaw.com
The Wilber Law Firm, P.C.	Donald L. Wilber	309-663-1245	dwilber@wilberlaw.com
S&S Claims Service	Kale Strickland	704-947-7722	kale@sslclaims.com
American Institute for CPCU/IIA	Sharon Koches	910-794-8442	koches@cpuiia.org
Paragon Subrogation Services	Renade Grant	818-576-2158	omartinez@paragonsubro.com
Certified Restoration Drycleaning Network	Jeff Schultz	800-520-2736	kati.hurlahe@crdn.com
Albors Alnet Language & Transportation	Pat Isom/Pat Murray	407-678-8634	patriciai@albors.com
American Educational Institute, Inc.	Patrick Vincent	908-766-0909	pvincent@aeiclaimslaw.com
Record Reproduction Solutions	Jon Leonhardt	800-550-3612	jonl@rrsnet.com
Claims Magazine	Bryan Pifer	859-692-2308	bpifer@nuco.com
Vaisala, Inc.	Chuck Parker	520-806-7300	chuck.parker@vaisala.com
JP Investigative Group, Inc.	Joe Paonessa	704-341-1238	joe@jpinvestigations.com



The winning team celebrates their success.



Our Group Was Named Kings and Queens of Them All!

Based on John Kotter's *Eight Steps to Successful Change*:

- **Increase urgency** - inspire people to move, and make objectives that are real and relevant.
- **Build the guiding team** - get the right people in place with the right emotional commitment, and the right mix of skills and levels.
- **Get the vision right** - get the team to establish a simple vision and strategy focus on emotional and creative aspects necessary to drive service and efficiency.
- **Communicate for buy-in** - Involve as many people as possible, communicate the essentials, simply, and appeal and respond to people's needs. De-clutter communications - make technology work for you, rather than against.
- **Empower action** - Remove obstacles, enable constructive feedback and lots of support from leaders. Reward and recognize progress and achievements.
- **Create short-term wins** - Set aims that are easy to achieve, in bite-size chunks. Set manageable numbers of initiatives. Finish current stages before starting new ones.
- **Don't let up** - Foster and encourage determination and persistence, ongoing change. Encourage ongoing progress reporting. Highlight achieved and future milestones.
- **Make change stick** - Reinforce the value of successful change via recruitment, promotion, and new-change leaders. Weave change into culture.

## Relaxation and Fun Activities Top Off the Success of the 2<sup>nd</sup> Annual Claims Education Conference.

### *Carolina Jeep Safari*

A light rain fell on Thursday afternoon when two vehicles full of attendees took off in hopes to see the wildlife of South Carolina. Well, apparently they saw plenty of "hogs" (Harley Davidson and other bikes) rolling up and down the main roads due to it being **Bike Week** in Myrtle Beach. But the real wildlife could be found in the low country on a barrier island. The group toured a Moorish-style plantation home site, remnants of rice fields, and they were even amazed by an 18-foot-long alligator that was sunbathing.

At one point, they exited the vehicles to tour a graveyard of a famous young lady named Alice. While one tour guide was reciting Alice's sad story, the other tour guide found delight in jumping out from behind a tree startling all who were standing around the grave.

### *The Golf Tournament at Grande Dunes*

Over 30 players enjoyed a great day of golf and networking. The tournament was held at the beautiful Grand Dunes Resort Course designed by Robert Rulewich. The intracoastal waterways could be seen as the teams made their way throughout the course.

Contests for overall lowest score, closest to the pin, and longest drive created a competitive atmosphere for both men and women players. Dave Vanderpan did a wonderful job coordinating this activity. Everyone enjoyed the afternoon of fun relaxation. Who knows, some business deals may have taken place while teeing off.

### *Medieval Times*

Modern transportation delivered the participants into a time long past. Once they entered the arena, everyone enjoyed feasting on a meal fit for a king. While feasting, trouble ensued as the story of a kingdom being threatened by treachery unfolded. The crowd excitingly engaged in cheering on their favorite courageous joust.

Wonderful music was performed by the world-renowned Prague Symphony Orchestra while exquisitely period-dressed participants entertained the crowd. The food, clothing, entertainment, and camaraderie made all the group feel like they were Kings and Queens. Wonder if they are still wearing their crowns and claiming to be royalty?!

#### **Social Reception Activities**

Lots of socializing, refreshing beverages and great appetizers were found throughout the receptions. Attendees, exhibitors and sponsors were given the opportunity to become more acquainted and develop new business relationships. This conference encourages attendees to visit all exhibitors during planned activities in the exhibit hall.

#### **Other Local Myrtle Beach Activities**

This area of South Carolina offers many great opportunities to enjoy the surf, sand and sun. Many attendees of the conference spent their leisure time by relaxing around the pool or walking along the beach that was just steps from the hotel.

#### **The 2007 Claims Education Conference says "Thank You!"**

The staff of International Insurance Institute and the Claims Education Conference extend a huge thank you to all of attendees, sponsors and exhibitors. Their success depends on the positive experience of these groups. All feedback is appreciated so that the future Claims Education Conferences meet and exceed expectations.

#### **What to Expect Next!**

Yes, it's back to the west coast to beautiful San Diego, CA! 2008 promises to be even better with new exciting breakout sessions, along with some great old standards like *Awesome Claims Customer Service*. Take a look at what they have planned.

#### **Adjuster-Specific Sessions:**

- Awesome Claims Customer Service
- Telephone Techniques for Claims
- Medical Terminology: The Key to Word Building
- Critical Thinking for Claims

#### **Manager-Specific Sessions:**

- Awesome Claims Customer Service for Managers
- Surveying Team Strengths and Weaknesses-Team Building Games
- Policy Interpretation Made Easy: So Easy You Can Teach It
- Managing Change
- Tracking Claims Staff Needs-III Course Offerings
- Working To-Do Lists for Managers-Priorities vs. Importance
- Effective Team Meetings
- Presentation Tips
- Effective Delegation

Attendees will enjoy the atmosphere Paradise Point Resort offers on the tucked away island at Mission Bay.

There will be plenty of things to do right at the hotel property like swimming in the 5 pools, soaking up sun on the sandy beach, water sports galore, and magnificent treatments by the exotic spa at the SpaTerre. If you wish to venture off premises be sure to visit Sea World, stroll through the Gas Lamp Quarter after dining at one of the many establishments, or see all the wildlife at the famous San Diego Zoo.

Don't get left out, be at the 2008 Claims Education Conference, May 13-16 in sunny San Diego, CA! Be ready to learn, meet/great people and have a ball while you're there! For more information, go to [www.ClaimsEducationConference.com](http://www.ClaimsEducationConference.com), or contact Lisa Ferrier at 952-928-4642.



The group continues socializing outdoors while lounging in Adirondack style chairs on the veranda.



Many enjoyed the convenience of the hotel, right on the beach!