

# Leadership, Coaching and Management Training for Claims

A complete program in six full-day workshops



**International Insurance Institute, Inc.<sup>SM</sup>**  
PROVIDING SPECIALIZED MULTI-LEVEL SUPPORT TO INSURANCE ENVIRONMENTS  
[www.InsuranceInstitute.com](http://www.InsuranceInstitute.com) 504.393.4570

# Concept

What are the key concepts to effective leadership? How do we motivate our claims employees?

Who makes the best claims performers? People who are analytical, or people who are creative? People who follow the rules, or people who think outside the box? People who like change, or people who don't like change?

What are the keys to a culture change? What is the best way to pick a team to manage change? How do we know when the change stays in place?

What drives employee performance? How do we inspire employees to improve? Is leading by example the best way, or is there one step better? What are the dividing lines between exceptional performers and everyone else?

What are the basics of teaching and coaching staff members? How do we inspire them to improve themselves? What is the best way to teach someone what we know?

How do we truly know which items are a priority, and what is the best way to make sure they get completed? How do we organize our work to deal with multiple priorities?

Based on concepts he developed from his books *The Eight Characteristics of the Awesome Employee* and *Attitude, Ability and the 80/20 Rule*, Carl Van, ITP, answers those questions and many more

All levels of management will benefit from the discussion of what drives employee performance and how to use that information to drive up one's own performance.

This program is spread out over time to prevent the "one and done" pitfall that occurs with extensive instructional training that has little follow up or reinforcement training.

The program can be facilitated in six full-day workshops, or three 2-day workshops, whichever works best for your company.

# Leadership

## Day 1

- Leadership quiz
- Leadership concepts
- Free book challenge
- Attitude, ability and the 80/20 rule
- The only information source you can trust is...
- Leading by example – good enough?
- Being a beacon
- Leadership through consistency, communication and credibility
- The visionary process
- Identifying claims environmental barriers
- Setting expectations of quality claims performance
- Positive feedback when appropriate
- Strategic planning that supports claims goals
- Developing actions plans connected to claims goals



# Teaching & Coaching

## Day 2

- Refresher from day 1. Review take-home work; discuss implementation of learned skills; review scenarios; score pre-class quiz; answer questions from webinar discussion; review case studies
- The three critical elements to effective coaching
- Identifying claims performance problems

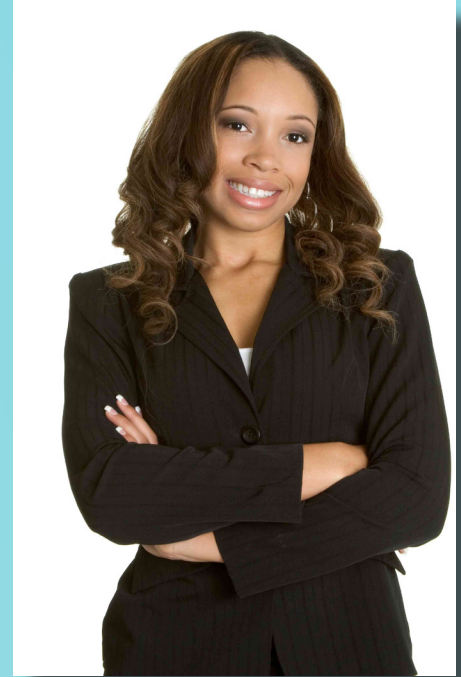


- Teaching vs. coaching
  - You trained them. Why are they still doing it wrong?
  - People learn at their own pace
  - How to tell if you have a training issue
- Management's role in training and development
  - Determining claims training objectives
  - Role contrast: Trainers vs. managers
  - Understanding the basics of adult learning
  - Supporting training and results
  - What intrinsically compels an employee to work hard
  - Ways to identify comprehension and follow up
  - Training absolutes for managers

# Motivation & Change

## Day 3

- Refresher from day 2. Review take-home work; discuss implementation of learned skills; review scenarios; score pre-class quiz; answer questions from webinar discussion; review case studies
- Change management concepts and tips
- Why some claims people hate change
- Why some claims people resist change
- How do we know if change is successful?
- Picking the right team to help manage change
- Painting a clear picture- A vision
- Communicating change simply yet effectively
- Making sure change stays in place
- One size fits one – motivation techniques for claims
- 95% of performance problems are caused by...
- Inspiring claims employees to improve
- Driving up claims employee performance
- Holding claims employees accountable
- Avoiding accepting mediocrity
- Developing attitude
- Developing initiative
- Dealing with difficult team members



# Personal Effectiveness

## Day 4

- Refresher from day 3. Review take-home work; discuss implementation of learned skills; review scenarios; score pre-class quiz; answer questions from webinar discussion; review case studies
- Common barriers to getting things done
- Myths about time management
- Planning and to-do lists
- Effective prioritization in claims
- Managing employee interruptions
- Managing the telephone and e-mail
- Managing diary
- Reducing phone calls
- Managing the in-box
- Learning your environmental needs
- Tools and resources for immediate implementation
- Skyrocket your management skills and trigger a culture in claims with practices based on learning
- Listening to solutions other than your own
- Tuning out emotional distractions
- Running effective claims meetings
- Interpersonal skills
- Professionalism
- Handling mistakes



# Employee Development

## Day 5

- Refresher from day 4. Review take-home work; discuss implementation of learned skills; review scenarios; score pre-class quiz; answer questions from webinar discussion; review case studies
- Identifying your own natural talents and strengths
- The best performers in claims
- StrengthsFinder – Understanding individual and team dynamics based on strengths
- Interviewing tips to find the best claims performers
- Identifying the natural talents of employees
- Using strengths of individuals to improve team dynamics
- Discover the diversity in the natural talents of others
- Improve team dynamics, cohesiveness and effectiveness
- Designing and monitoring claims process improvements at the adjuster level
- Instilling customer satisfaction ownership at the claim representative level
- Teambuilding techniques
- Delegating effectively
- Conflict management
- Helping claims employees improve their time management skills



# Decision Making

## Day 6

- Refresher from day 5. Review take-home work; discuss implementation of learned skills; review scenarios; score pre-class quiz; answer questions from webinar discussion; review case studies
- Critical thinking skills for managers
- Learning how to think things through
- Opposite Blindness – Mistakenly thinking two things are opposite when they are not (quality vs. customer service)
- Avoiding the pitfalls of poor decision making
- Understanding the reasons for poor or mediocre claims performance and customer satisfaction
- Removing barriers to exceptional claims performance
- Relating customer process improvement to fundamental claims handling guidelines
- Leadership decision making





## *Workshop Timeframes*

Workshops are generally 9:00am – 4:00pm.

The suggested time frame between workshops is anywhere from one month to three months. The suggested class size is 25 – 30. This ensures enough conversation and interaction during the day to keep the workshops interesting, informative and fun.

## *Scheduling*

All workshops are scheduled at your convenience, on a day that is best for you. We can deliver the workshops at any location (your office, hotel meeting space, etc.) on any day of the week including Saturdays and Sundays.

There is no long-term contract required by International Insurance Institute. There is no obligation on the part of your company to continue the remaining workshops. Any and all workshops can be canceled at any time, for any reason, with no penalty.

There is no obligation to facilitate all six of the workshops. You are free to pick and choose which ones best suit your needs. You are free to change the order of the workshops as well.

## *Pricing*

Standard	Member
\$425 per person per workshop	\$300 per person per workshop
Plus travel expenses	Plus travel expenses

For budgetary purposes, assume \$1,000 USD per workshop for travel expenses of the instructor.

There is no charge for “no-shows.” If you invite 32 people, and only 22 show up, you are only charged for 22.

## *How the class works*

The workshop is very interactive. Attendees are split into teams for the day. During the day, they will work together to discuss the concepts, practice the learned skills, as well as solve case studies and scenarios. For each workshop, new teams are formed.

## *Keeping Focus*

In order to keep the information fresh, and encourage application of the learned skills, between workshops, each student will be asked to do the following:

- Complete a short quiz on the material covered in the workshop
- Review and answer a case study
- Attend a 1-hour webinar conducted by an III facilitator reviewing the material
- Read a summary of concepts and questions answered during the last workshop
- Prepare a list of questions about the topics for the next workshop
- Describe successes and challenges in applying the newly learned skills in a short brief to be reviewed by the facilitator
- (optional) Read a book or periodical suggested by the facilitator

Any of these activities can be expanded upon, reduced, or even eliminated based on your request.

All of these extra-curricular activities are included in the workshop pricing by International Insurance Institute, Inc.



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## Instructor for the Course



**Carl Van, ITP, President & CEO of International Insurance Institute, Inc.**, graduated from California State University, Sacramento where he received his bachelor's degree in Insurance. He has been in the insurance claims industry since 1980 and has held the positions of Claims Adjuster, Claims Supervisor, Claims Manager, Division Claims Manager and Regional Manager over Claims, Loss Control and Premium Audit.

Mr. Van has written articles for Claims magazine, Claims Education Magazine, Claims Advisor, Claims People magazine, The Subrogator, The National Underwriter, California Insurance Journal and over 100 other national magazines. He is the author of over 75 technical and soft skill workshops being taught throughout the U.S., Canada and the U.K.

He has been a keynote speaker at claims conferences around the country, a trainer at an international U.S-Japanese executive training program, a guest speaker at hundreds of claims association seminars, and selected as the opening presenter at some of the most prestigious claims conferences in the United States and Canada.

Mr. Van is the Dean of the School of Claims Performance, and has served as both board member and Regional Vice President of the Society of Insurance Trainers and Educators. He is the publisher of Claims Education Magazine, board president of the Claims Education Conference as well as creator, presenter and producer of all claims training videos at Claims Education On Line.

Mr. Van is owner and publisher of Claims Professional Books On Line, and is the author of the highly acclaimed book *The 8 Characteristics of the Awesome Adjuster*, which has sold internationally throughout the United States, Canada, Guam, Singapore, France, Australia, England, Chile, Ireland, and 25 other countries. Other books by Carl Van include *Gaining Cooperation*, *Gaining Cooperation for the Workers' Comp. Professional*, *The Claims Cookbook*, *Attitude, Ability and the 80/20 Rule*, *The Eight Characteristics of the Awesome Employee*, *Negotiations Skills for the Claims Professional*, and the upcoming *Awesome Claims Customer Service*.

He writes all materials for his Carl Van Claims Expert blog, and provides claims tips on his Carl Van Professional Speaker You Tube channel. Just for fun he writes all lyrics to the songs performed by Carl Van and the Awesome Adjuster Band.

Past credits include being an arbitrator, a licensed agent, a TASA expert witness for insurance Bad Faith suits, as well as a national auditor for a federal regulatory agency.

[www.InsuranceInstitute.com](http://www.InsuranceInstitute.com)

[www.CarlVan.org](http://www.CarlVan.org)

[www.Facebook.com/CarlVanspeaker](https://www.facebook.com/CarlVanspeaker)

[www.Twitter.com/carlvanspeaker](https://www.twitter.com/carlvanspeaker)

[www.Linkedin.com](https://www.linkedin.com) (Carl Van – Awesome Adjuster group)

[www.CarlVanClaimsExpert.wordpress.com](http://www.CarlVanClaimsExpert.wordpress.com)

[www.ClaimsEducationConference.net](http://www.ClaimsEducationConference.net)

[www.ClaimsEducationMagazine.com](http://www.ClaimsEducationMagazine.com)

[www.ClaimsEducationOnLine.com](http://www.ClaimsEducationOnLine.com)

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## ***New Orleans***

***INTERNATIONAL  
INSURANCE***

***INSTITUTE, Inc.***

***6221 S. Claiborne Ave. #639***

***New Orleans, LA 70125***

***Tel: (504) 393-4570***

***E-Mail: [CustomerService@InsuranceInstitute.com](mailto:CustomerService@InsuranceInstitute.com)***

***[www.InsuranceInstitute.com](http://www.InsuranceInstitute.com)***



## ***Nashville***

***INTERNATIONAL  
INSURANCE***

***INSTITUTE, Inc.***

***1113 Murfreesboro Rd. Bldg 106, #413***

***Franklin, TN 37064***

***Fax: (775) 942-8289***

***E-Mail: [CustomerService@InsuranceInstitute.com](mailto:CustomerService@InsuranceInstitute.com)***

***[www.InsuranceInstitute.com](http://www.InsuranceInstitute.com)***



## ***Sacramento***

***INTERNATIONAL  
INSURANCE***

***INSTITUTE, Inc.***

***705-2 E. Bidwell St. #291***

***Folsom, CA 95630***

***Fax: (775) 942-8289***

***E-Mail: [CustomerService@InsuranceInstitute.com](mailto:CustomerService@InsuranceInstitute.com)***

***[www.InsuranceInstitute.com](http://www.InsuranceInstitute.com)***