

# Claims Education

INTERNATIONAL INSURANCE INSTITUTE *e*magazine

TRAINING || TALK

FEATURE || STORY

In this issue we feature a story recapping some of the highlights from the 2017 Claims Education Conference held in New Orleans, LA in May.

Also see our News Briefs section for information about the new format of the joint conference between International Insurance Institute, American Educational Institute and The Society of Claim Law Associates which moved permanently to New Orleans on May 16, 2017.

This issue we welcome quite a few new customers, especially on the international level. See if there is anyone you know in the News Briefs section.

Our Feature Course section provides information on the latest addition to our highlighted workshops, Arbitration Tips offered by Ben Ebling of Latitude Subrogation Services and featured at this year's Claims Education Conference.

Also, check out our new program of offering FREE training to member companies in the News Briefs section.

As always, we here at International Insurance Institute welcome your contributions to CEM and encourage you to contact Karla Alcerro at [karla@insuranceinstitute.com](mailto:karla@insuranceinstitute.com) for any input. Please feel free to direct any questions, feedback, articles, claims success stories, and/ or even topics that you would like to see discussed in the magazine. ■



**Carl Van**  
President and CEO  
International  
Insurance Institute

## THERE'S NO PLACE LIKE HOME

*Successful 12th Annual  
Claims Education Conference  
Held in New Orleans*

BY CARL VAN, ITP



*Attendees Socializing  
at the Opening Reception*

For the seventh year in a row, International Insurance Institute, Inc. has joined forces with the American Educational Institute and the Society of Claim Law Associates to host a conference focused on claims education. Much to the delight of the attendees and organizers alike, the conference was held in the Crescent

City, home base for the International Insurance Institute, Inc., for the first time since 2010.

The Claims Education Conference welcomed over 200 attendees and their guests from May 16-19 at the Hilton New Orleans Riverside hotel. This centrally located grand hotel boasts amazing views of the Mississippi, several bars and restaurants, including the world-famous Drago's, a luxurious pool and fitness center and tastefully updated rooms. The hotel is across the street from Harrah's casino and a short walk

## FEATURE || STORY

to the French Quarter, WWII museum, Audubon Aquarium and many other top New Orleans attractions.

The location and activities are both important components of the Claims Education Conference; however, attendees return year after year because of the valuable information they take away from the different breakout sessions offered.

All soft-skill subjects were presented by III trainers Carl Van, Dave Vanderpan and Teresa Headrick. This year they included:



*Teresa Headrick Guiding the Strengths Finder 2.0 Class*

- Awesome Claims Customer Service Pt. 1: Dealing with Difficult Customers
- StrengthsFinder 2.0: Now Discover Your Strengths
- Motivating Employees: One Size Fits One
- Awesome Claims Customer Service Pt. 2: The Five Standards of Great Claims Organizations
- Driving Up Employee Performance
- Negotiation Skills Pt. 1: The Think/Feel Strategy
- Negotiation Skills Pt. 2: Staying in Your Conversation
- Time Management Pt. 1: Five Tips for Reducing Phone Calls
- Introduction to Online Claims Training
- Time Management Pt. 2: The Working To Do List
- Gaining Cooperation
- Teambuilding Games
- Arbitration Tips for Auto Claims

The technical subjects were presented by AEI Speaker Sponsors David Alfini, Esq. of Hinshaw & Culbertson, LLP; Craig Bennion, Esq. and Alissa Christopher, Esq. of Cozen O'Connor; David Bronstein, Esq. of Bronstein & Carmona P.A.; James Busenlener, Esq. of Matthiesen, Wickert & Lehrer, S.C; Jarred Dichek, Esq. and Kenneth Oliver, Esq. of Kubicki Draper; Duncan Fobes, Esq. of Patterson, Buchanan, Fobes & Leitch; Rick Santoro, CPP of National Forensic Consultants; and Matthew J. Sekits, Esq. of Bullivant Houser Bailey P.C.

## TECHNICAL SUBJECTS INCLUDED:

- Defeating the Made Whole Doctrine
- Protecting Your Pre-Suit Investigation
- Reservations of Rights Letter: Purpose, Proper Preparation and the Pitfalls of Failing to Prepare
- Security Considerations in Premises Liability Matters
- Ridesharing: Sticking Your Thumb Out in the Digital Age
- Material Misrepresentation Update
- Employment Law
- Bad Faith Liability: Prevention and Control

When they weren't busy attending sessions, the attendees and their guests took advantage of all that the "Big Easy" has to offer by participating in one of the many social activities organized by the Claims Education Conference. Attendees had their choice of going to the New Orleans School of Cooking where they learned how to cook an authentic Louisiana



*David Alfini, Esq. Teaches, "Protecting Your Pre-Suit Investigation"*

meal and were able to enjoy the fruits of their labor; golf at the brand new Bayou Oaks golf course in City Park; an afternoon stroll through the French Quarter with a local guide to talk about the grim and ghastly deeds of the olden days complete with a stop at Lafitte's Blacksmith Shop, the reputed oldest bar



*French Quarter Ghost Tour*



*Dave Vanderpan, Teresa Headrick, John Hebert, Thomas Ruffino and David Alfini enjoying the Mississippi River Cruise*



*Andrea Gallegos, Steve Terrell, Blane Kusterle, Melissa Kusterle, Jacqueline Terrell and Jessica Enriquez cruising along on the Creole Queen Paddlewheeler*

in the United States; a swamp tour featuring alligators and rare wildlife; and a jazzy river cruise on the mighty Mississippi. With so many choices, there truly was something for everyone.

In addition to the activities, attendees also had the option to join their friends and colleagues for an enjoyable evening out for dinner at one of three Emeril Lagasse restaurants for the annual Claims Education Conference dine-around. The res-



*Carl Van, Jon Coscia, Tina Hill, Erica Lloyd, Andrew and Brittany Noble; Deborah Callahan, and Tonee West having a good time at the Chef's table at Emeril's New Orleans*

taurant choices were Emeril's New Orleans, Emeril Lagasse's flagship restaurant; NOLA, a vibrant restaurant located in the French Quarter; and Delmonico's, a gem in the Garden District known for the quality of its steaks. The only problem attendees encountered was deciding which restaurant to try!

Food is an important part of the culture of New Orleans and the conference organizers wanted to be sure the conference fare reflected those values. Rubber chicken and stale donuts were nowhere to be found. Instead, attendees were delighted by the conference offerings with a New Orleans flair includ-



*Some Entertainment at the 99-Second Fun Talk*

ing fresh beignets, king cake and a mouth-watering lunch buffet featuring seafood gumbo, jambalaya and a "to die for" white chocolate bread pudding with bourbon sauce. Nobody left the conference hungry, that is for certain.

The Claims Education Conference brought back the 99-second fun talk by popular demand. Just after attendees enjoyed their lunch, conference staff called each participating exhibitor up to the stage for their 99-seconds of fame. With a large timer counting down behind them, the exhibitors did their best to entertain while telling us more about their company. This year we had a lively scavenger hunt, a few poets, some attempts at stand-up comedy and lip-syncing ... in drag. We can't wait to see what our exhibitors do next year to top this year's entertaining line up!

The Claims Education Conference just wouldn't be the same without some of the "extras" that make it so special. During the opening reception, guests were treated to live music by Michael Krejci ("Kret-see"), a



*Michael Krejci Performing at Reception*

## FEATURE || STORY

singer-songwriter, guitarist, and producer based in Nashville, Tennessee and former International Insurance Institute employee. When attendees arrived for breakfast and the first set of breakout sessions, they were charmed by the sounds of a live Dixieland band. It really set the tone for a great day of learning. Attendees were also excited to take part in a prize drawing which included over \$2,000 in various gift cards as giveaways. The grand prize was a \$1,000 gift certificate to Apple and a complimentary conference registration for 2018.

The Claims Education Conference would like to thank the conference Diamond Sponsor, Latitude Subrogation Services. Their sponsorship allowed the conference to provide many of the special extras, goodies and giveaways. Latitude provides a wide variety of services such as Subrogation Management, Identification Programs and Salvage Administration. The organizers would also like to extend thanks to the exhibitors (see list below) and to the attendees for joining us in New Orleans.

### DIAMOND SPONSOR

Latitude Subrogation Services



Paul Webb, Lee Herman, Jon Coscia, Adam McIntosh, Carl Van, Chef Anthony, Ann Van and Ben Ebling get a behind the scenes look at Emeril's New Orleans.

### EXHIBITORS

American Educational Institute/Society of Claim Law Associates  
Bronstein & Carmona P.A.  
Cozen O'Connor  
DJG Investigative Services, Inc.  
Grecco Construction Consultants, LLC

HGI  
I-CAR  
International Insurance Institute, Inc.  
Kubicki Draper  
Latitude Subrogation Services  
Matthiesen Wickert & Lehrer, S.C.  
National Forensic Consultants  
The National Underwriter Company  
New Orleans Family Justice Center  
RIMKUS Consulting Group, Inc.  
Stuart-Lippman and Associates, Inc.  
Thomas George Associates, Ltd.  
VeriClaim, Inc.  
Wilber Group

*We'd also like to congratulate the following AEI members for achieving a designation. A Designation Conferment for designees and their guests took place during the conference. ■*



Deborah Callahan, SCLA Gold, Executive Director/CEO of Washington Schools Risk Management Pool being recognized as the Distinguished AEI Conferment Speaker.

### LEGAL PRINCIPLES CLAIM SPECIALIST (LPCS)

Kelsey C. Ball – Acuity Insurance

### FRAUD CLAIM LAW ASSOCIATE (FCLA)

Thomas J. Ruffino – National Insurance Adjustment

### SCLA SILVER AWARD

Deeann Means – Argo Group US

Charlene L. Bennett – EMC Insurance

Michael Pavia – New York Property Insurance  
Underwriting Association

Joseph Chalifoux – Utica National Insurance

Sean McGovern – Utica National Insurance

Samantha K. Payne – Utica National Insurance

Lisa DuBose Day – Washington Schools

Risk Management Pool



**SCLA GOLD AWARD**

Charlene L. Bennett – EMC Insurance

Joseph Chalifoux – Utica National Insurance

Sean McGovern – Utica National Insurance

Samantha K. Payne – Utica National Insurance

Susan A. Peterson – Washington Schools

Risk Management Pool

**SENIOR CLAIM LAW ASSOCIATE (SCLA)**

Debra Thompson – AmTrust North America

Joseph Jesse – Argo Group US

Deeann Means – Argo Group US

Phillip Stoddard – Argo Group US

Charlene L. Bennett – EMC Insurance

Corinne Barnett – Federated Mutual Insurance Company

Gregory Bolton – Federated Mutual Insurance Company

Carolyn Jensen-Brill – Federated Mutual Insurance Company

John Sundby – Federated Mutual Insurance Company

Michael Svestka – Federated Mutual Insurance Company

Christiaan Visser – Federated Mutual Insurance Company

Laura Kisaka – First Insurance Company of Hawaii Ltd

June Rosete – First Insurance Company of Hawaii Ltd

Alissia A. Conover – Highland Claim Services, Inc.

Jackie Bain – Kentucky Farm Bureau Mutual

Blane J. Kusterle – Kentucky Farm Bureau Mutual

Tina Jo Maggard – Kentucky Farm Bureau Mutual

Jacqueline Terrell – Kentucky Farm Bureau Mutual

Stephanie Wright – Kentucky Farm Bureau Mutual

Sharon Richard – Liberty Mutual

Michael Pavia – New York Property Insurance

Underwriting Association

Fred Connery – Ohio Mutual Insurance

Christopher P. Rozelle – Utah Local Governments Trust

Sarah Buczek – Utica National Insurance

Joseph Chalifoux – Utica National Insurance

Marcellus L. Coleman III – Utica National Insurance

Laura Shea Garramone – Utica National Insurance

Nicole Haas – Utica National Insurance

Jim Hollub – Utica National Insurance

Kimberly Hughes – Utica National Insurance

Sean McGovern – Utica National Insurance

Samantha K. Payne – Utica National Insurance

Abby M. Puleo – Utica National Insurance

Brenda Venne – Utica National Insurance

Kathleen J. Waterman – Utica National Insurance

Lisa DuBose Day – Washington Schools

Risk Management Pool

*The 13th Annual Claims Education Conference will take place May 8-11, 2018 at the Hilton New Orleans Riverside. Visit [www.claimseducationconference.net](http://www.claimseducationconference.net) for more details. We hope to see you there!*



# CLAIMS EDUCATION CONFERENCE

Presented by

American Educational Institute, International Insurance Institute  
and Society of Claim Law Associates



American  
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Institute



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Institute, Inc.



*The conference where AEI designees are recognized for their achievements*

**MAY 8-11, 2018**  
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# BEN EBLING

## 2017 CLAIMS EDUCATION CONFERENCE



Ben Ebling, Business Development Manager, Latitude Subrogation Services, dazzled his audience with a very informative and interactive session entitled, Tips for Arbitration: Writing effective contentions and preparing evidence.

### BEN AND HIS CAREER

Ben joined Latitude in June 2012. He brings with him a wealth of claims subrogation knowledge and experience acquired during his 25 year insurance industry career with Westfield Group and Nationwide Insurance companies. During that time he served as a Claims Representative, Trainer, Sr. Subrogation Specialist, Regional Subrogation Manager, and Business Project Management Consultant. Ben earned his degree in Business Management and holds the designation of CSRP with NASP, and MCSA with Arbitration Forums. He has supervised various claims business units and the quality department for Latitude. His current area of responsibility is new client development, and fostering long-term client partnerships and affinity business relationships.

### BEN'S PERSONAL SIDE

On the personal side, Ben enjoys spending time with his family and doing outdoor activities such as biking, long-

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## FEATURE COURSE AT THE 2017 CLAIMS EDUCATION CONFERENCE

# LEADERSHIP SKILLS FOR LEADERS



### CONCEPT

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

Who makes the best 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 has stuck?

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, answered those questions and many more.

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

# The Subro Workshops

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INSTITUTE, INC.



**Carl Van** President and CEO

#### Workshop One

### Negotiation Skills for the Subrogation Professional

Tips on how to be persuasive and how to understand the other person's point of view.

#### Workshop Two

### Real-Time Management for Subrogation

Subrogation professionals use their own issues and barriers in problem solving exercises. The focus will end with result oriented activities.

#### Workshop Three

### Interpersonal Skills for Subrogation Personnel

Key skills to gaining trust that can greatly assist the subrogation professional's collection efforts.

Latitude Subrogation Services is the leader in recovery services for the insurance industry. International Insurance Institute is the number one claims training company in the U.S. and Canada. They've teamed up to design valuable, real-life, subrogation specific training for the subrogation industry.

For information about opportunities to receive free training sponsored by Latitude Subrogation Service, please contact:

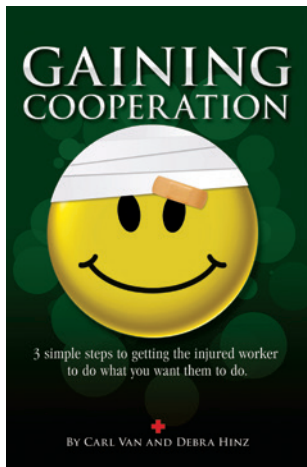
**Jon Coscia** Latitude Subrogation Services  
Executive Vice President  
**877-454-3400**  
jcoscia@latitudesubro.com

<http://latitudesubro.com/movie/>

Latitude is a proud NASP Platinum VIP Sponsor and sponsor of the NASP 2015 Workers' Compensation Benchmarking Study.  
1760 South Telegraph Road, Suite 104, Bloomfield Hills, Michigan 48302



## Claims Professional Books



### FEATURE BOOK THIS ISSUE:

*Gaining Cooperation for Worker's Compensation:  
3 simple steps to getting injured workers to do  
what you want them to do.*

When asked to finish this sentence, “My job would be so much easier if the injured worker would just.....” most Workers’ Comp people say “Cooperate.” Sometimes getting injured workers to cooperate can be a chore, even if it is better for them. Even simple things like filling out a form, answering some questions, or sending in information can be examples where injured workers don’t want to cooperate.

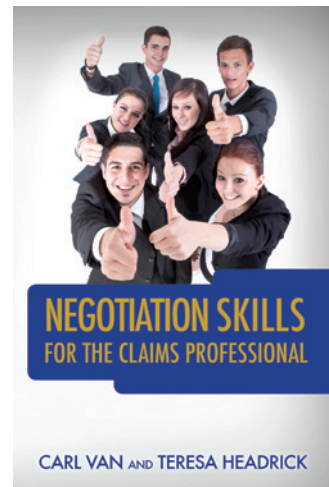
Based on the principles developed in the original Gaining Cooperation, this book is specific to the Workers’ Comp industry. All examples are real-life situations faced in the Workers’ Comp business, and certain to be “must-have” for any Workers’ Comp professional.

Written by Debra Hinz and Carl Van. (Paperback \$19.95 available at [www.ClaimsProfessionalBooks.com](http://www.ClaimsProfessionalBooks.com), [www.Amazon.com](http://www.Amazon.com), and other on-line book sellers; Kindle \$9.99)

Visit [www.ClaimsProfessionalBooks.com](http://www.ClaimsProfessionalBooks.com) to view all of the books available:

- *The 8 Characteristics of the Awesome Adjuster*
- *Gaining Cooperation: Some simple steps to getting customers to do what you want them to do*

- *Gaining Cooperation for the Workers’ Comp. Professional: 3 simple steps to getting the Injured Worker to do what you want them to do*
- *Attitude, Ability and the 80/20 Rule: The Makings of Exceptional Performers*
- *The Eight Characteristics of the Awesome Employee*
- *The Claims Cookbook: A Culinary Guide to Job Satisfaction*
- *Negotiation Skills for the Claims Professional*



## New Customers

We are delighted to welcome our newest members who have joined International Insurance Institute’s member list, either through on-site training, on-line video training or training materials.

### United States

- Michelle Anderson - UTICA National - New Hartford, NY
- Christopher Aragon - TURO-San Francisco, CA
- Peggy Buddenhagen - MetLife Group - Troy, NY
- Larry Cook - American Modern Insurance - Amelia, OH
- Brian Francis - Maxcis - Southfield, MI
- Rick Hobbs - United Heartland - New Berlin, WI
- Amy Knapp - American Family - Madison, WI
- Barbara Krzeczowski - First Chicago Insurance- Bedford Park, FL
- Erica Lloyd- Builders Mutual - Raleigh, NC

- Elle Murphy - RCIS - Anoka, MN
- Brittany Noble - AMICA- Lincoln, RI
- Eric Oxfeld - Tennessee Workers' Comp - Murfreesboro, TN
- James Ronan - WV National Auto Insurance - Morgantown, WV
- Dale Sherman - Allstate Insurance - Northbrook, IL
- Mark Sparks - Brentwood Services - Brentwood, TN
- Pete Strayer - Windsor Mount Joy Insurance - Mountville, PA
- Anthony Valente - Legacy Insurance - Phoenix, AZ
- Amy Wurhurst - Integrity Insurance - Appleton, WI
- Melissa Zens - RAS Companies - Sioux Falls, SD

*Feature Instructor: continued from page 7*

board skateboarding, and snow skiing. Ben and his wife, Kandie Carson, are also actively involved with fostering



puppies and dogs for the local animal shelters and rescue groups in Columbus Ohio, and have helped rescue and place over 100 dogs and puppies with adoptive families.

Ben recently celebrated a proud moment when he held his new grandson for the first time, Connor, who arrived over the Christmas Holiday.

## **International**

### **Africa**

- Chindo Ernest Ntoh - Zenith Insurance S.A. - Cameroon, Africa
- Denis Tamale - Claim Care Uganda Ltd. - Kampala, Uganda

### **Bangladesh**

- Mahibullah Khan - MetLife Insurance - Dhaka, Bangladesh

### **Brazil**

- Alessandro Correa Pasti - Tokio Marine Brazil Insurance- Sao Paulo, Brazil

### **India**

- Swatantra Kumar - Faizabad, India
- Raghu Shankarpuram - Bangalore, India
- Piyush Tripathi - Knapur Nagar, India

### **Liberia**

- Jackie Smith-Mutual Benefits Assurance Co. - Monrovia, Liberia

### **UAE**

- Mumtaz Shah - German Care International - Dubai, UAE ■

## **THE SESSION**

Ben's session was designed to develop the skills that participants need in order to prepare an effective case. Participants learned how to:

- Write an introductory statement
- Write the body of the contentions
- Write a closing statement
- Support each allegation with specific evidence
- Prepare the evidence that will support the contentions
- Make contentions logical and easy to follow
- Help the arbitrator(s) remember important points from the case
- Guide the arbitrator(s) to the specific location of the evidence

Knowing the main points of a case and presenting them in a persuasive manner is crucial. By using a consistent format, participants learned how to help the arbitrator(s) easily identify the information that supports him/her in making a sound decision.

The goal was to ensure the contentions clearly state the issue at hand, the important points to consider and the ultimate outcome that is being pursued. ■

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