

# Claims Education

INTERNATIONAL INSURANCE INSTITUTE

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## FEATURE || TALK

## 5TH Annual Claims Education Conference Earns Superbowl Status

The 2010 Claims Education Conference celebrated its 5th year in its hometown of New Orleans, Louisiana. Playing off of the New Orleans Saints Superbowl championship, the conference claimed a winning season by scoring a touchdown in all course training sessions.

"As represented in the chart below," commented Ann Van, Conference Site Director, "the attendees certainly seemed to have enjoyed themselves and found the information meaningful." She continued, "100% of the attendees surveyed said that they would recommend this conference to others, and we are extremely proud of those results."

Dave Vanderpan, Director of Claims Training, also emphasized survey results. "Claims people are typically a tough audience to please because their time is so valuable." He added, "Claims people need and want information that is relative to them and directly applicable to their jobs. They have little patience for time consuming training that produces modest results. This makes results such as 96% of attendees felt the programs were valuable very pleasing."

The conference started off with the normal fare of welcoming new comers and congratulating those returning. Individuals who were attending their third Claims Education Conference received a personally autographed cookbook from Chef Emeril Lagasse. They were:

- Tonya Bernhard
- Phil Sherman
- Diahana Cousar-Walker
- Alice Sologic
- Geoff LaMarche
- Linda Timpe
- Pat Noske

Attendees making their fourth appearance to the Claims Education Conference were presented with an Emeril Lagasse cooking apron, also personally autographed by Chef Emeril. They were:

- Deb Agate
- Sharon Savageaux
- Gary LaMarche
- Jeff Schultz
- Deb Mohler
- Patrick Vincent

Finally, those in attendance who had made it to all five of the Claims Education Conferences were presented with a library collection of six Emeril Lagasse cookbooks. All were personally autographed by Chef Emeril. They were:

- Ani Naccachian
- Patti Weiland
- Tom Behrend



Claims Education Conference Site Director, Ann Van, has some fun with a bull riding theme at the vendors 99 second fun talk.

The names of the last five people in the "Last Man Standing" contest were announced. Each will remain in the running for a 14 day Mediterranean cruise in an outside suite cabin, including airfare and \$1000 spending cash.

A new "Last Man Standing" contest was announced where the winner would receive a 28 day cruise in an outside suite cabin to Hawaii, Bali, and Australia including round trip airfare for two and \$2500 spending cash. Sweet!

Along with the exceptional breakout sessions (which will be listed later in this article), attendees enjoyed activities such as a horse and buggy tour of the famous New Orleans French Quarter; a golf outing at the PGA sanctioned English Turn Golf Course; a paddle wheel river boat experience along the Mississippi River; and for those who stayed a little bit longer, a tour of some famous plantation homes. The highlight activity of the conference was certainly the dine-a-round experience, where attendees split into three groups, each visiting one of three restaurants of Chef Emeril Lagasse. Sandy Odem, Senior Sales Manager of Emeril's Home Base, organized the entire event and insured every attendee had a dining experience to remember. Each attendee at the dine-a-round was presented with an Emeril themed towel, personally autographed by the famous chef.

Lisa Ferrier, Conference Manager, was quick to point out that the real reason people come to the conference is for the great training. "Year after year, conference attendees tell me how much they're looking forward to the real life claims education they receive." She



Guest Instructor Teresa Headrick of UNUM brings a new and interesting perspective to encouraging employees to do their best in her "Motivating Employees: One Size Fits One" seminar.

added, “Each session comes with a workbook that attendees are allowed to take home with them and are encouraged to share with others.”

### Awesome Claims Customer Service

This session focused on teaching claims professionals to be able to recognize and deliver outstanding customer service. Participants gained an understanding of the basics of providing high quality customer service, learned proper telephone techniques, gained insight into understanding what individual customers need, learned to manage the customer’s perception, as well as understood the essential role customer service plays in the success of the claims department.



Students are pleasantly surprised how enjoyable learning can be in the “Awesome Claims Customer Service” lesson.

Richard Edgar of Traveler Insurance commented that, “this course offered workable tools and techniques to improve customer service”. Diane C. Williams of Mercury Insurance noted that “the course was very well delivered and that it was also very engaging”.

Chris Vilella of CEI Group stated, “One of the best negotiating courses I have participated in my 20 years in claims” Kim Ellislul of WSI-ND added, “It was a great session. I really got some steps I can use in my negotiations”.



Tanya Roberts and Sharon Savageaux of Liberty Mutual have fun practicing their new negotiation skills in the interactive “The Think-Feel Negotiation Strategy” clinic.

### The Think-Feel Negotiation Strategy: The Key to Knowing What People Want

This session outlined key negotiation steps and provided practice opportunities to sharpen these negotiation skills: (1) Finding out what the other person wants; (2) Acknowledging their point of view; (3) Building a bridge from their point of view to yours; (4) Gaining an agreement for them to consider your point of view; and (5) Presenting your facts in a way that does not conflict with their point of view. These are all steps great negotiators swear by.



Dave Vanderpan, Director of Claims Training for International Insurance Institute leads a vivacious and fun filled “Teambuilding Games” program.

### Team Building Games

As mentioned in the News Briefs section, this was a new addition to the course catalog, and debuted at the fourth Claims Education Conference in Coeur d’ Alene, Idaho. In this session, we discussed and demonstrated some effective team building games and activities that you can use with your staff of the team you lead.

### Motivating Employees: One Size Fits One

Participants learned what is important and what intrinsically compels an individual to work hard. ‘One Size Fits One’ showed participants how to ask the right questions, ‘clamp it shut’ and listen, then use what is learned. One participant, Stacie Visser of Montana State Fund stated quite emphatically “the instructor changed my entire philosophy!” Deb Mohler of FDMI commented, “This was the most inspiring class in my four years of conference attendance.”

### Critical Thinking for Claims: The 10 Pitfalls to Watch Out For

This session taught attendees the 10 most common critical thinking errors and how to avoid them when considering statements made by witnesses, weighing credibility of proof being supplied by customers, and even analyzing coverage. The pitfalls included: Making things too simple; Using facts that are irrelevant; Making a case based on no facts to the contrary; Making a case for the masses; Begging the question; Attacking the messenger; The slippery slope; Ignoring painful information; Falsely championing a cause and effect; and Creating a straw man.



Sherri Levin seems to enjoy herself as she participates in the “Critical Thinking: 10 Pitfalls to Avoid” breakout.”

Pam Smith of Sterling National said, “I liked the constant interaction and class participation. It really kept us involved.”

### Making Your Point: Communicating Effectively With Anyone

This program used a sample of the feedback report the participants actually received. They went through an analysis of self improvement strategies and were coached to help reach their full potential. This session taught participants to build upon trust, cooperation, understanding, and acceptance when dealing with differing behaviors.

“The instructor did a great job. He knows his material and





Guest Instructor Paul Balbresky of Balbresky Consulting (and President of SITE – Society of Insurance Trainers and Educators) keeps his session lively while giving out pointers in the “Communicating Effectively with Anyone” class.

seems to enjoy presenting. I would recommend this class to anyone,” explained Chris Peacock of Rural Community Insurance Services.

### Time Management for Claims

This session included real-life scenarios geared specifically towards claims and allowed participants to leave with some very practical methods of improving time management that they can put into place right away.

“This was an excellent course, I loved it,” said Teresa Ramos of Mercury Insurance.



Students pay careful attention in the “Time Management” mini-class.

### Building the Guiding Team: The Key to Successfully Managing Change

In this session, participants learned how to get the right people in place with the right emotional commitment and the right mix of skills and levels when building a guiding team through change.

According to Brian Metzler of Sterling National, he felt he had many take-aways from this class. Sharon Savageaux of Liberty Mutual expressed that the class was very useful and that she learned a lot.

### Dealing with Difficult Customers: How to Effectively Deal with Snide Comments and Angry People



Paul Balbresky of Balbresky Consulting, Irene Bianchi of RSA Canada, and Jack Stewart of Assurant solutions enjoy their “Dealing with Difficult Customers” breakout.

Linda Tempe of Safe Auto picks up some important tips in the “Change Management: Building the Guiding Team” Session.



This course focused on teaching claims professionals how to recognize snide comments and appropriately acknowledge and deal with them in a manner that will allow the claims process to move forward. This course also taught participants how to communicate with an angry customer and how to effectively deal with the customer’s issue in order to then move on with the claims process.

Kerrie Kaufmann of Mennonite Mutual said that she enjoyed the role playing and discussions and that good examples were used that related to “what we do”.

### Litigation Management

This session guided participants through the mechanics of litigation and emphasized how to effectively analyze settlement opportunities at critical junctures. Pre-litigation settlement strategies, impediments to resolution, setting a litigation plan, and cost analysis were all discussed. Participants also learned other topics such as managing your defense and keeping the insured informed.

Ann Van, site director, was quick to remind all attendees to save the dates of next May 10th through May 13th, 2011 for the 6th Annual Claims Education Conference that will be held at the beautiful Harbor Beach Marriot Resort and Spa in Fort Lauderdale, Florida. For information, please, contact Juli Wagner at 952-928-4642 or, visit at [www.claimseducationconference.com](http://www.claimseducationconference.com). ■

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