

From the Chair — Goodbye

by Michael J. Jagadich, CPCU, FMA, AIM, AIC, ASC



Michael J. Jagadich, CPCU, FMA, AIM, AIC, ASC, is an assistant administrative services manager in State Farm's Heartland Zone located in Lincoln, Neb. He joined State Farm in 1986. Jagadich is currently ending a three-year term as chair of the Leadership & Managerial Excellence Interest Group, and has served as president as well as in several other positions in the CPCU Society's Nebraska Chapter.

A short three years ago, I was writing my introduction as chair of the then Total Quality Interest Group. Wow, how time flies!

Over these past three years, our group has experienced some major changes, challenges and opportunities, such as:

- Renaming our interest group from Total Quality to Leadership & Managerial Excellence in order to better encompass our concepts and focus, and to help others more easily identify how quality, leadership and management relate to all areas of the insurance industry.
- Losing six experienced leaders/members, but acquiring six new, outstanding members in their places — all who continue to contribute and advance our efforts.
- Focusing our efforts by formalizing, routinely reviewing and updating our group's mission, vision and tactical plans.

- Formalizing our succession planning to ensure that quality, capable leaders are in place to continue to advance our group's work.
- Partnering with the American Society of Quality (ASQ) to share best practices and information to develop a larger exposure base and collaborate on quality themes and learning efforts.
- Embracing new technology in a wide variety of areas, in particular social networking and its capability to advance our interest group and the Society's goals.

During my term as chair, my father-in-law, a CPCU designee since 1970, often asked me, "What does 'Total Quality' mean?" and then later, "What does 'Leadership & Managerial Excellence' mean?" Every time, I'd ramble on for several minutes about

Continued on page 2

What's in This Issue

From the Chair — Goodbye	1
Our Own Laura Kelly Honored with Leadership Award	2
Business E-Mail Culture — Manage It or Watch Your Profits Slide Away	3
Is Fear of Change Real — Or Are We Just Lazy?	4
LME Committee Holds Meeting at Leadership Summit	6
Imaginative Leadership — To Inspire Creativity and Spawn Innovation	7
Managerial Due Diligence — Communicating to Affect Process Improvement	10

From the Chair — Goodbye

Continued from page 1

servant leadership, engagement, Six Sigma, continuous renewal, process improvement, etc. Each time my responses expanded, and those discussions opened new ideas for growth. As I end my term, I hope our group's efforts have allowed these various concepts and tools to be shared and used by CPCU members and nonmembers alike.

Although I am saddened with the end of my term as chair, I am also very excited that Chair-Elect **Laura M. Kelly, CPCU, AIC, AIS, ASQ, CQIA**, will

be assuming this responsibility in the fall. Laura has been a tremendous leader, contributor and resource to both our group and the Society. I look forward to her leadership as she continues to develop and advance our group's focus and efforts.

I have thoroughly enjoyed my time as chair and have grown during my term. I have also had the fantastic opportunity to meet, work with and develop networks with a vast group of great folks. I'm ending this experience, but intend

to continue my CPCU journey and involvement with my chapter and Society for the long term.

As the Leadership & Managerial Excellence Interest Group continues to move forward with new initiatives and advance leadership ideals and concepts, I hope you will continue to view us as a trusted resource and advisor.

Thank you and best wishes! ■

Our Own Laura Kelly Honored with Leadership Award

At the Leadership Summit in Phoenix, the CPCU-Loman Education Foundation presented **Laura M. Kelly, CPCU, AIC, AIS, ASQ, CQIA**, Leadership & Managerial Excellence Interest Group chair-elect, with the 2010 Richard A. Gerrond Memorial Award.

Recipients are chosen based on criteria including consistent and excellent performance within the CPCU Society Center for Leadership, the CPCU Society and other professional activities. The award was created in memory of **Richard A. Gerrond, CPCU, CIC**, a dedicated instructor and Society governor, who passed away in January 2005.

Congratulations, Laura! ■



Laura M. Kelly, CPCU, AIC, AIS, ASQ, CQIA, with Douglas J. Holtz, CPCU, CIC, CSP, CRM, CPCU Society president and chairman, on left, and Richard C. Lambert, CPCU, ARM, Executive Committee member of the CPCU-Loman Education Foundation and member of the Society's Board of Directors, on right, at the Leadership Summit in Phoenix.

Business E-Mail Culture — Manage It or Watch Your Profits Slide Away

by Marsha D. Egan, CPCU, CPIW, PCC



Marsha D. Egan, CPCU, CPIW, PCC, is CEO of The Egan Group Inc., an executive coaching firm. An International Coach Federation Certified Coach, Egan brings more than 25 years of corporate and volunteer leadership experience to her individual and organizational clients. A sought-after internationally recognized professional speaker who has appeared on countless television and radio shows and in magazines, her keynote addresses, seminars, teleseminars and webinars energize audiences to change and achieve greater success. Egan was the 1999–2000 president of the CPCU Society.

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Every time you let your e-mail interrupt your productive work, it takes you an average of four minutes to get back on track. If in one day you let 15 e-mails derail you, you've just lost an hour of billable, productive time. Multiply that by every employee, every day, and you can see how office-wide unproductive e-mail use can be an enormous drain on your profits.

Have you ever stopped to examine how your employees use their e-mail? How they manage it, send it and save it? The habits they adopt, both good and bad, can be contagious. Since e-mail touches all of us several times a day, an office e-mail culture evolves quickly.

Here is an example. A boss calls a meeting with three of his department managers. He sends an urgent e-mail, needing a response within 15 minutes. One manager, who is working on an important project, does not have his e-mail on, misses the request and angers his boss.

This manager has just now learned that he cannot turn off his e-mail — ever. But it doesn't stop there; it rolls down the corporate ladder. All three managers now have "permission" to use e-mail as an urgent delivery system. They use it in their departments, and very quickly the entire organization is infected. No one can turn off his or her e-mail for fear of missing something vital. Employees become slaves to the "brinnng" and stop productive work anytime an e-mail comes in.

This is just one example of e-mail misuse that plagues businesses. Think of the practices of copying everyone under the sun, just so you don't miss someone. Or how about using e-mail as a chat room with multiple recipients to resolve dilemmas? Or the slippery slope of using e-mail to critique someone's performance? One person does it; others do it. Culture is changed.

There are, however, certain practices you can instill in your employees to create a positive e-mail culture. It requires strong leadership and change management efforts, but by following these methods, you and your employees will be able to reclaim more time and improve your bottom line.

- (1) Never use e-mail as an urgent delivery system. If the matter is urgent, pick up the phone or walk down the hall.
- (2) Have everyone turn off "Automatic Send/Receive" and set "Receive Intervals" to a minimum of 90 minutes. If someone is expecting an e-mail, he or she can always hit "Receive Manually."
- (3) Move everything out of your inbox. Your employees can manage their work better by putting e-mails in appropriate folders for easy reference later.
- (4) Make subject lines very specific. By including details in subject lines, you will help others sort and prioritize their work.
- (5) Copy only the people who really need to receive the e-mail. Each superfluous "cc" will have to open and read the e-mail, adding unnecessary tasks to his or her already full day.

For more best practices or information about changing your office's e-mail culture, check out www.eganemailolutions.com. ■

Is Fear of Change Real — Or Are We Just Lazy?

by Peter Wright

Peter Wright is president of The Planning Group. As a respected executive in the financial services industry and in his current consulting practice, Wright has successfully developed and executed business strategy with notable results. His practical approach to strategic and operational planning ensures that plans are not only embraced by the management team, but effectively implemented and measured. He will be speaking on the topic of laziness at the 2010 CPCU Society Annual Meeting and Seminars in Orlando, Fla., on Tuesday, Sept. 28. His seminar is entitled, "Fear of Change Is a Fallacy."

Editor's note: (1) This article is printed with permission. © Peter Wright, the Planning Group. All rights reserved. (2) Do you have a story or anecdote about laziness in the workplace that would be a good example for Wright's upcoming book? Please put it in an e-mail with all your contact information and send it to lazy@theplanninggroup.ca.

Are people really afraid of change? Is there truly some human condition that prevents us from doing things differently? I don't pretend to know anything about personal fear of change, but when it comes to my role as a consultant, likely half my effort is trying to get people to make progress and to improve — ultimately to convince people to execute the plans they have set for themselves. In the right culture, the task is easy. But in so many organizations, it seems that people simply don't want to work any harder. That's it ... there is no real fear of change — just a fear of hard work.

A recent survey by the publication *Investors in People* found 75 percent of managers and 80 percent of employees thought some colleagues were "dead wood," and the main reason was thought to be laziness.

Think of the last five situations in your company, association or volunteer board that were "all talk and no action." Was it really a fear of change that prevented progress? If you really dig deep into each situation, you will likely find one or two humans that blocked real progress because they just didn't make the effort.

I work with people of all intellects, and I can honestly say I come across very few unintelligent people. But I certainly see my share of lazy people. In organizations big and small, you will find individuals that simply don't want to put forth any more effort tomorrow than they did yesterday. Perhaps you know someone who won't pitch in as part of a team to get things done or won't learn a new way of doing things. Do you work with someone who will in no way put his or her neck on the line or never follows through?

"Fear of change" may be the most obvious, but we use many terms in our organizations — ones that if we look closely enough are really just euphemisms or codes for laziness:

- Procrastination.
- Fear of failure.
- Risk aversion.
- Unclear accountabilities.
- Lack of data.
- Plagiarism.

In a recent planning session with a large national association, I had a senior person make an impassioned plea to his boss and peers as to why a particular initiative didn't fit with the strategy. It was passionate, but the argument didn't make any sense. Not everyone was following his argument because the initiative actually seemed like a good fit, but I thought I knew what was coming. He ended his discourse with, "... and my team would need to do most of the work, and we just don't have the time." No offense intended to the individual, but he didn't actually care whether the particular initiative in question was good for the organization or not. He just didn't want to do it. I think that is laziness.

I'm not sure what is worse — the people who promise and never deliver or the people who have even given up promising. At least people who make plans and promises have good intentions. People who constantly block every new chance at progress are killing our organizations. You know who I mean — those people in your workplace who are living, breathing examples of Dilbert characters.

Every organization has a few people who simply refuse anything new because they are always "too busy." Or, they could just be too lazy to drag their heads out of their operational troughs and try something new. If these folks dedicated the time and energy they spend talking about how busy they are to new initiatives, they could be your organization's change agents!

Let's be clear. Many companies have downsized, and there are countless

employees who are truly overworked. Those are not the people I am referring to here.

A few people who are “always too busy” in an organization may not do too much harm. In a big enough organization, they might actually be a source of comic relief. But if these people start to get rewarded for how “busy” they are and the phenomenon spreads, an organization can really be in trouble. The worst cases I have seen lately, more in associations than in companies, are when these “too busy” people start to fill the positions of power. At that point, the productivity and growth of the organization are at real risk.

I had a client forward an e-mail to me with a comment that nailing down the accountability for ownership of a particular project was proving difficult. The e-mail thread had more than 20 parts to it, and the end result looked like a virtual game of “accountability hot potato.” The truth is that the accountability was clear. The most senior person involved in the e-mail conversation even pointed out the clear accountability — several times. But the person who should have taken on the ownership just didn’t want to. He never tried to make a case that the project was wrong or that the timing was wrong or that the project did not fit with the strategy. He just tried to make a case that he didn’t want to do it. Call that what you want. I call it lazy.

“According to a survey by America Online and Salary.com, the average American worker admits to wasting 2.09 hours per eight-hour workday ...”

Of course, the phenomenon didn’t start in the workplace. As a society, some could argue that the pace of life has



increased, but without a doubt, we have become lazier. In another recent study, those surveyed say they litter because they are lazy. They don’t want to carry their bottles, cans and fast food wrappers around, so they just drop them.

According to a survey by America Online and Salary.com, the average American worker admits to wasting 2.09 hours per eight-hour workday, not including lunch and scheduled break-time. Most companies assume a certain amount of laziness when setting wages, but the survey shows employees wasting twice as much time as predicted. Salary.com calculated that U.S. employers spend about \$759 billion per year on salaries for which real work was expected but not actually performed.

From my perspective, this measure of laziness is really just about productivity. My real concern for our organizations is the opportunity cost of laziness. I fear that laziness is blocking the true innovation and breakthrough performance that all organizations are capable of achieving.

This is such an interesting topic that I should write a book about it ... but I’m too lazy. ■

LME Committee Holds Meeting at Leadership Summit



Phoenix, Arizona 2010

Leadership & Managerial Excellence Interest Group Committee members posed for a group photo at the Leadership Summit in Phoenix. From left, Janice Hendricks, CPCU; Meredith Mangan, CPCU; Ellen Barnett, CPCU; Kimberly Sterling, CPCU, CLU, ChFC, AIM; Linda Gomez, CPCU; Carol Blough, CPCU, CLU; Mike Jagadich, CPCU, FMA,

AIM, AIC, ASC; Dave Davenport, CPCU, AIC; and Sandy Jones, CPCU, CLU, ChFC. Not pictured: John Gilleland, CPCU, AU, API; Jim Jones, CPCU, ARM, AIC, AIS; Laura Kelly, CPCU, AIC, AIS, ASQ, CQIA; and Kerry McGrath, CPCU, AU, AIS, CPIW.

Imaginative Leadership — To Inspire Creativity and Spawn Innovation

by Kent L. Jackson, CPCU, Ph.D.



Kent L. Jackson, CPCU, Ph.D., is the principal of Jackson Research Strategy Solution LLC and co-author of the CPCU Society's Strategic Brand Thinking course. He provides branding, positioning and market research services for a variety of businesses and nonprofit entities in insurance, financial services, health care and real estate sectors. He partners with **Ernie Grecsek, CPCU, M.A.** As instructors and consultants, they are well known to CPCU Society members. Joining them in the development of the Imaginative Leadership course are **Dominic Catrambone** and **Jeremy Kent Jackson**, partners, co-creators and artistic directors of DiscoveryOnstage Inc., a theatrical education enterprise based in Los Angeles.

Editor's note: This is the first in a series of articles developed exclusively for the Leadership & Managerial Excellence (LME) Interest Group newsletter and the CPCU Society Center for Leadership, introducing the concepts and applications of Imaginative Leadership, a new program developed collaboratively between the CPCU Society Center for Leadership and DiscoveryOnstage. Watch for the next article co-authored by **Dominic Catrambone** and **Jeremy Kent Jackson**, describing the content of a full-day pre-session course to be offered this fall as part of the CPCU Annual Meeting and Seminars in Orlando, Fla., Sept. 25–28. A final article authored by **Ernie Grecsek, CPCU, M.A.**, will address specific outcomes and applications of Imaginative Leadership.

What makes for a good business leader in times like these? Conventional wisdom holds that leaders must be highly intelligent, well organized and, given sufficient time and resource, able to "master" the complex demands of leadership. Or, they must be courageously inclined to "step into the breach" and charismatically motivate others toward an energizing vision of the future.

The "mastery leadership" model is generally viewed as best suited to situations in which choices are many, resources stable and time horizons distant. The second "heroic leadership" model is favored in situations where choices are few, scarcity prevails and time is short.

For each, the paths to leadership development are different. One emphasizes aptitude and formal learning — get your MBA at Harvard. The other emphasizes personality attributes and experiential testing — take the "Big Leap" literally and/or figuratively.

But what if you and your situation suggest the need for something dimensionally different?

A Third Dimension of Leadership

Seldom do we experience leaders able to blend mastery and heroics to address times like these and industries like ours that are at once striving and thriving somewhere in between. There is a third model to consider, one that integrates knowledgeable understanding and an appreciation of traditional leadership models with a challenging and applied focus on skill development in areas more commonly associated with the performing and theatre arts. Described as the Imaginative Leadership model, this third leg of leadership reflects hybrid qualities augmented by theatrical skills training in artistic creation, production and performance.

Why Theatrically Based Skills Training?

The linkage between leadership and artistic endeavor is well established. From highly touted corporate programs offered by famous comedy companies to establishing graphic artists and musicians in-residence, that idea of integrating the creative and performing arts into the corporate culture is gaining traction across the country and across industries.

These programs, while meritorious in many respects, are essentially designed to lay artistic endeavor alongside the principles and experiences of management and leadership, and often focus on personal or individual development of creative skills. The Imaginative Leadership concept, as developed by the DiscoveryOnstage team, in contrast, carefully integrates proprietary theatrical principles and practices requiring the engagement of

Continued on page 8

Imaginative Leadership — To Inspire Creativity and Spawn Innovation

Continued from page 7

an entire team of participants in the creative process with the latest research on organizational leadership principles and processes.

Led by a team comprised of recognized CPCU Center for Leadership facilitators and the accomplished DiscoveryOnstage founders and principals, you end your day ready to apply what you have learned — increasing your leadership competencies and enhancing your organization's capacity to innovate.

Is Your Situation Right?

Are you finding yourself responsible for an initiative where a few choices may be known but you are open and seeking new and innovative possibilities? Do you have the critical team talent you need but little tenure or experience in working with the team? Do you have a general sense for the initiative's overall vision but a desire to engage the team in the process of imaginatively refining, focusing and connecting that vision directly to the talents and executable resourcefulness of the team? If your answer is "yes" to each, then your situation may be right for exploring the concept, skills and organizational benefits of Imaginative Leadership.

What Is Imaginative Leadership?

The concept can best be explained with a historical example shared in an article by the Rev. **Kim Thoday** of the Church of Christ of South Africa, on the subject of Imaginative Leadership as reflected in the accomplishments of **Winston Churchill**:

"Great leaders are those who have great imagination and great courage. Imagination is a more encompassing idea than vision. Churchill was certainly a visionary, and vision is important for leadership, for we know that without vision, people perish. But visionaries are sometimes



too erudite, too abstract. To be imaginative as a leader, however, is to cultivate a finely balanced ability to imagine a future possibility and to see with clarity all the possible connections (vision), to be able to communicate that vision as an artist and to be grounded within the sacred "bone" of history. Churchill cultivated each of these processes of the truly imaginative person."

Rev. Kim Thoday
Church of Christ of South Africa

Conceptually then, Imaginative Leadership blends creative imagination with courage, rooted knowledge and understanding, and the capacity and skill to artfully engage others in the process of moving forward. It begins with the virtue of courage — the willingness to step into the breach — something to which you are already committed.

What Are the Skills of Imaginative Leadership?

Developing the skills for Imaginative Leadership entail a fine merger of learning, reflecting and thinking about

leadership with active hands-on practice in the techniques and artistry of creative collaboration. This unique combination of "thinking" and "doing," combined with consideration of how related concepts like branding, positioning and strategy apply, incorporate the following:

- The regular practice of new creative communications techniques.
- Development of value-focused and creative collaboration skills.
- Learning new ways to think creatively while inspiring innovation.
- Gaining confidence in expressing and developing creative value-add ideas.
- Experiencing the dynamics and creative power of the group imagining together.

What Are the Benefits of Imaginative Leadership?

Experiencing an Imaginative Leadership workshop will provide you and your organization with multiple and measurable benefits. To put these benefits in context, consider this feedback from an LME leader who participated in the pilot workshop last fall at the CPCU Society's Annual Meeting and Seminars in Denver:

"Since attending the CPCU-hosted DiscoveryOnstage workshop, I came back to work in the throes of my company's 2010 planning meetings. The workshop was extremely helpful as I worked with my branch manager to put together our branch planning for 2010 as well as our rollout. I was amazed at how many of our staff took the time to advise that it was one of the best meetings they have attended in quite some time. I incorporated items that I learned in the session, and it was a great success!"

Kerry L. McGrath, CPCU, AU, AIS, CPIW
Senior Branch Marketing Director
Acadia Insurance

Other benefits reported by participants in a post-session survey relative to the participant and the sponsoring organization include the following:

- You will demonstrate commitment to creative and innovative leadership by participating in and successfully completing this unique, one-of-a-kind experience.
- You will learn to encourage and develop other emerging leaders to explore and apply the principles and concepts of Imaginative Leadership.
- You will strengthen your own brand equity, and that of your organization, through enhanced value creation.

- You will develop inspired leaders and energize your workforce.
- You will discover new ways to develop a sustainable culture that values Imaginative Leadership and continuous innovation.

Conclusion

These are times that call for a new form of leadership, one that blends convention with imagination and the ability to lead through the creative engagement and talent of others. To do so requires courage and confidence and the ability to both “think” and “do” in a manner that integrates related concepts of organizational branding, positioning

and strategy. The benefits of Imaginative Leadership inure to both participant and sponsoring organization. As evidenced by participants, the results are palpable and measurable.

For more information about Imaginative Leadership — Developing Leadership Skills to Inspire Creativity and Spawn Innovation, the CPCU Center for Leadership full-day course being offered at the Annual Meeting and Seminars in Orlando, visit www.cpcusociety.org, click on the “Orlando 2010, Register Now” button, and select “CPCU Society Center for Leadership.” You can also visit www.discoveryonstage.com and click on “Corporate Programs.” ■



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Managerial Due Diligence — Communicating to Affect Process Improvement

by John T. Gilleland Jr., CPCU, API, AIS, AU



John T. Gilleland Jr., CPCU, API, AIS, AU, is a trainer of property-casualty sales professionals. He has experience as a general manager, underwriting manager, personal lines production underwriter and commercial insurance salesperson.

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As a leader, would you like to communicate in ways that affect process improvements more efficiently? If yes, consider how diligent you are about development, communication and implementation. A search for "due diligence" on Google produced results associated most frequently with making decisions relating to acquisitions and lending most often. The typical article concerns managers' and other types of leaders' due diligence in general and communication to large groups of diverse audiences in specific. It answers the question: As a leader, would you like to communicate in ways that effect process improvements across several teams with diverse interests and responsibilities?

Many organizations are compared, unfavorably, to battleships when change is being discussed. Such discussions often include statements such as, "This is a battleship, not a jet ski." This statement may be colorful, but it does not resonate well with leaders wanting responsive and receptive reactions from teams. Unfortunately, leadership efforts are often met with resistance and resentment.

When it comes to organizational change and process improvement, all too often people are told and not sold; therefore, they do not buy it. Pronouncements are made, but they lack context and clarity, so implementation is resisted — or at least neglected. Too many leaders naively assume what they dictate will be understood, appreciated and implemented accurately and consistently.

Many leadership initiatives should be underwritten¹ and then communicated in well managed ways. As **Donald J. Hurzeler, CPCU, CLU**, wrote recently in a Leadership & Managerial Excellence Interest Group newsletter: "When things go wrong, suspect yourself ... When I did learn to suspect myself, I got good at examining the communications preceding a failure and often found that my communications had not been clear."

Please think of the last formal policy change statements you've received, and then reflect on how well those statements were interpreted and implemented. Did the memo or policy produce the intended effects? If yes, find out why so it can be replicated. What virtues were present to assure the value of the documentation? If no, please consider the following process for communication² with less frustration and greater improvement.

(1) Develop a story. Publish, formally and informally, the who, what, why, how, when and if concerning the subject. Make it persuasive, so those who care about reasons and details will be able to echo and/or embellish your reasoning for the change(s).

- (2) Choose a champion. Determine who will be the cheerleader to enthusiastically tell the story to groups and begin to build popular support.
- (3) Show what you mean. Use decision trees, matrices and if/then tables to illustrate and communicate any procedures with any options or uncertainties. Help your team(s) sing from the same sheet of music.
- (4) Enroll those willing to change. People are most likely to sustain what they help create, so first find those who are most willing to implement improvement(s). See that they are enabled to learn and commit and then do what it takes to succeed.
- (5) Publish successful implementations. Recognize, reward and respect those who appropriately adopt the improvement(s) first. ■

Endnotes

- (1) Management policies, like insurance policies, should be the result of a disciplined decision-making process. This reduces the likelihood of unsubstantiated decisions (e.g., WAGs) and their harmful results.
- (2) Communication should follow validation of the proposed change(s). According to **Frank Dallahan** in his article "In Search of Perfection" in *JCK Magazine* (February 2001), yes, Sam Walton "is credited with the business philosophy expressed in the phrase, 'Ready, Fire, Aim.' But that is because Walton, a pragmatist, believed any idea, project or product has limitations. His philosophy was to get the project to market or to completion as quickly and as reasonably well done as possible, given the time constraints of the marketplace. Once it was up and running, a project could be adjusted and improved and the kinks ironed out. This worked at a price he was willing to pay."

Your Leadership & Managerial Excellence Interest Group presents ...

Social Networking for Professional Success

Sunday, Sept. 26, 2010 • 2:45–4:45 p.m.

Presenter: Marsha D. Egan, CPCU, CPIW, PCC, The Egan Group Inc.

Emerging Issues for Today's Insurance Professional

Monday, Sept. 27, 2010 • 1:30–5:10 p.m.

Presenter: Richard J. Cohen, J.D., Goldberg Segalla LLP

24 Ways to Avoid Getting into Trouble — Best Practices for Managing Agent and Broker E&O Exposures and Claims

(Filed for CE credits.)

Tuesday, Sept. 28, 2010 • 1:30–4:15 p.m.

(Co-Developed with the Agent & Broker Interest Group)

Presenters: Richard J. Cohen J.D., Goldberg Segalla LLP, and William C. Wilson Jr., CPCU, ARM, AIM, Independent Insurance Agents & Brokers of America



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CPCU Society
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Chair

Michael J. Jagadich, CPCU, FMA, AIM, AIC, ASC
State Farm
E-mail: michael.jagadich.bgaq@statefarm.com

Co-Editor

Sandra L. Jones, CPCU, CLU, ChFC
State Farm
E-mail: sandy.jones.ccoj@statefarm.com

Co-Editor

Janice Hendricks, CPCU
State Farm
E-mail: janice.hendricks.gsfn@statefarm.com

CPCU Society

720 Providence Road
Malvern, PA 19355
(800) 932-CPCU (2728)
www.cpcusociety.org

Director of Program Content and Interest Groups

John Kelly, CPCU, AIS

Managing Editor

Mary Friedberg

Associate Editor

Carole Roinestad

Design

Leslie Higgins

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