CPCU SOCIETY
INSURING YOUR SUCCESS

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Message from the Past Chair

by Laura M. Kelly, CPCU, AIC, AIS, ARe, MLIS, ASQ, CQIA, featuring LoriAnn Lowery-Biggers

Laura M. Kelly, CPCU, AIC, AIS, ARe, MLIS, ASQ, CQIA, is director of best practice compliance/insurance industry liaison for Goldberg Segalla LLP, overseeing the firm's compliance and quality department. Kelly's past experience includes more than 15 years in the insurance industry in roles as a claims adjuster, claims supervisor and litigation manager. She is past chair of the CPCU Society Leadership & Managerial Excellence Interest Group Committee and president of the CPCU Society Northeastern New York Chapter, among other leadership roles. Kelly is also an active member of the American Society for Quality.

Editor's note: Congratulations to Laura M. Kelly, CPCU, AIC, AIS, ARe, MLIS, ASQ, CQIA, on her recent appointment as chair of the 2012 Annual Meeting Task Force, and to Kimberly A. Sterling, CPCU, CLU, ChFC, AIM, on her ascension to chair of the Leadership & Managerial Excellence Interest Group.

In my position of responsibility, it is always beneficial to gain new insight into leadership skills and ways to hone those skills. Therefore, I have a great interest in attending programs on this subject, especially if I can pick up some tips to share with our members. Late last year, I attended a presentation given by **LoriAnn Lowery-Biggers** (see her bio at the end of this article) in which she introduced listeners to what she termed the "Leadership Backpack" and detailed the tools that are included in it. Many of her points really stood out to me, and before I knew it, I had pages of notes from her presentation. I was so impressed with her ideas that I decided to reach out to her and ask if she would agree to contribute to this month's article in the *Leadership & Managerial Excellence Interest Group* newsletter. Fortunately, she was willing, and the following article is a collaborative effort brought to you in a somewhat different format than the usual "Message from the Chair," as I share with you specific points of interest from her presentation, while LoriAnn adds some additional comments and examples.

As I listened to LoriAnn's presentation, a key point for me came early when she suggested to us, "Don't wish away where you are." Her explanation was that all too often we focus so much on where we want to go that we forget to appreciate where we are at the moment. Arriving at our destination can sometimes actually result in wishing we could go back!

In addition to that keen observation, LoriAnn went on to describe the tools she believes should be included in the "Leadership Backpack" we all want to be carrying with us. I will take an overall look at her ideas and also have her weigh in on them.

(1) Lighten Your Load by Lightening Up on Yourself.
We can be our own worst enemies by letting doubt about our abilities or a lack of confidence creep in and

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settle into our minds. Carrying the weight of your perceptions about your possible shortcomings will only bring you "back pain," LoriAnn says. "Just imagine how sorry you would feel for a backpacker who carried the packs from his back of all of his prior hikes. He would never make it up the mountain. It is important to learn from your prior issues without carrying them forward with you. Don't let your past dictate your future."

(2) Be Aware of the Power of Perception.
As worthwhile as it is to know that your own perceptions of your shortcomings can make themselves a reality, it is also important to consider the fact that you are much more in control of the perceptions others have of you than you may realize. Everything you do, from how you present yourself to your actions, will form the image of you that people see. Those are things that are in your control, and being aware of that is essential. LoriAnn states, "We have all heard that perception is reality; it is imperative that you ask yourself how you are perceived."

(3) Take Time to Perform a 360-Degree Self-Assessment.
When was the last time you tried this? Chances are it may have been never. Make an appointment with yourself and set aside a specific time for performing a self-evaluation. Identify both strengths and weaknesses, and be detailed. After you have done that, request objective evaluations from those around you so you can compare your own self-assessment with the feedback received from others. "Feedback is critical, set an appointment with yourself to have an honest personal evaluation," says LoriAnn.

(4) Identify Your Constraints.
What holds you back from achieving goals and having success? Identify constraints resulting from your own behavior that keep you from reaching your potential, because those are within your control to change. It could be you are overconfident, or the opposite, that you are lacking self-esteem. Maybe you have difficulty coping with change, or you have low drive when working towards certain goals. It could even be that you are overly aggressive or demanding. Arrange the specific constraints into a hierarchy, recognizing those that may prevent you from getting where you would like to be. Then determine what you need to change. "Personal constraints set your limits. They stagnate what you can achieve no matter how gifted or talented you are. They affect every area of your life: personal, professional, emotional and spiritual," says LoriAnn.

(5) Define Your Destination.
How can we get anywhere if we do not even know where we are going? Consider both the destination and the route you will need to take to get there. Always keep your goals in mind and do not be afraid to navigate into new territory to reach them. LoriAnn asks: "You would never venture out into an unknown territory without finding out where you are going and how to get there; why would you approach your life without mapping out your path?"

(6) Determine Your Own Value.
Your worth to those around you depends strongly on you being able to bring exceptional value to what you do. Management can be seen as a commodity, so differentiate yourself from that perception by showing something above and beyond the norm and therefore defining your own value and worth. "Make sure you are continually building value and differentiating yourself," advises LoriAnn.

(7) Assess Your "Leadership Quotient."
Take into consideration the important factors of leadership: integrity, inspiration, initiative, innovation, intelligence, influence and impact. Rate yourself on a scale of one to 10. Come up with an overall score and start working towards improving the weaker aspects. Says LoriAnn: "Leaders need to ask themselves: How do I inspire with integrity, initiate innovation, and impact and influence those around me?"

(8) Brand Yourself for Career Success.
In order to be of special worth, you have to figure out what you do well and brand it! Be a valuable and indispensible resource to your company with your own unique skill set and then work those skills into the brand of you! "A powerful brand is a memorable force," says LoriAnn.

(9) Create a Personal Mission Statement.
This is not a statement about what you have already done, but rather about what you currently do and what your plan is for the future. This mission statement is just three to five sentences, or even a short "elevator speech," less than two minutes long. Perfect it over time to make it your own definitive statement about what you do and where you want to go.

(10) Build Your Own Network Plan.
Do not wait until you need a network to create one. Ideally, you want to establish your own personal advisory board that you can reach out to for feedback at times you have questions or need advice. Reach out at every opportunity to bring people you value into your network.

(11) Remember You Are an Exhaustive Resource.
After reading all of the above gems on how to direct yourself toward leadership success, your head may be swimming with ideas on how to add to your "Leadership Backpack." It is valuable to strive for improvements within yourself, but it is also important to keep in mind that realistically you just cannot do everything. Remember to be honest with yourself about what you can handle. Admit to yourself that there will be some tasks you will have to decline, and be resolute in sticking to your limits. That way, you can truly stay at the top of your game and not spread yourself too thin to be effective. "If you are physically, mentally and emotionally depleted, you will have no reserve to contribute to anything or anyone else," says LoriAnn.

Success and becoming your best takes hard work and what it means to one person is not the same for everyone else. No matter how you define your own success or what you consider as goals, the advice given by LoriAnn in the program I attended definitely gives food for thought about tools that can improve your leadership qualities. I hope that we relayed our ideas to you in a way you can take with you on your own journey towards career success! ■

LoriAnn Lowery-Biggers is president of field operations at Navigators Management Company Inc. She has more than 20 years' experience in the insurance industry, most recently as president of Lloyd's North America. LoriAnn has also held executive positions with Marsh and Wells Fargo.

She also serves on a number of boards, including the national board of Prevent Child Abuse America, the A21 campaign and the advisory board of St. John's University. A keynote speaker and panelist at numerous conferences, she was chosen as a 2010 *Reactions* magazine "Rising Star" award recipient and is a 2008 *Business Insurance* magazine "Woman to Watch." She has been the subject of feature articles in a number of publications, including the *Wall Street Journal* and *Financial Times*, and twice as the cover of *Best Weekly.*

Her extensive community service includes mission trips for Habitat for Humanity and Service over Self. She has made mission trips to Lebanon, South Africa, Israel and Mexico, where she taught ethical business practices to women entrepreneurs. In November, she plans to return to Greece and Bulgaria to work with the A21 Campaign to help girls who have been used in human trafficking. She is an advisor to the One Heart Project and U-Turn Program. She resides in Dallas with her husband.

Bylaws and Standing Rules — Why Are They Important?

by Laura A. Santo, CPCU, AINS, API, CPIW, FIPC

Laura A. Santo, CPCU, AINS, API, CPIW, FIPC, is a rating specialist with Amica Insurance Company. She is a past council director for the state of New York with the International Association of Insurance Professionals, past president of the Federation of New York Insurance Professionals Inc. and past president of the Insurance Professionals of Albany. Santo is the current president of the CPCU Society Northeastern New York Chapter. She has presented programs on parliamentary procedure throughout the state of New York.

This is the time of year when most CPCU Society chapters have recently installed a new slate of officers. The installation ceremony typically includes the oath, which is recited by the incoming officers: "I do solemnly promise that I will observe and support the constitution and bylaws of the Chartered Property Casualty Underwriters Society and the 'Name of Chapter,' and that I will discharge the duties of my office with fidelity." What exactly does that mean? Has anyone actually read the constitution and bylaws of the chapter?

Each officer should be familiar with these documents and refer to them whenever there is a question. This is where you will find the descriptions of the officer duties, what to do if an officer suddenly resigns, term limits and just about anything else you would want to know about how to run the chapter. You can find a copy of the sample constitution and bylaws in the "Chapter Leader Guide (Administration Manual)" on the Society's website. From the home page, click on the "Chapters" tab and "Planning Resources." If you no longer have a copy of your chapter bylaws, you can contact the CPCU Society chapter services manager for a copy.

If you cannot find the answer to your procedure question under the bylaws, try looking under your chapter standing rules. What exactly are standing rules? The chapter standing rules will address administrative procedures for the chapter that may not be addressed in the bylaws or any duty that the chapter wishes to further clarify. An example would be the treasurer's position:

> **Section 4. Treasurer.** Periodic financial statements shall be submitted to the Board of Directors and members. Books and accounts of the treasurer shall at all times be open to the inspection of any member and of any authorized auditor. The treasurer shall also perform such other duties as usually pertain to the office of treasurer.

Maybe your chapter has added duties to this position, such as being responsible for booking the meeting facilities and ordering the meals for the monthly chapter luncheon. This additional duty of the office would be included under the chapter standing rules. Or, maybe your chapter has created a hospitality position that handles all the meeting logistics. This information would also be in the chapter standing rules, since the position is not addressed in the chapter bylaws. Any other situation not specifically addressed would be referred back to *Robert's Rules*. There are numerous, easy-to-read editions of *Robert's Rules* in the bookstores. Each chapter should have an updated copy as a reference for the chapter leaders.

Take a look at these chapter documents from time to time. It is important to review the standing rules and bylaws so that your chapter is on track with the ideals and guidelines of the CPCU Society. ■

The Art and Science of Situational Leadership

by Richard Gehres, CPCU, MBA, PMP, CLU, ChFC, FLMI

Richard Gehres, CPCU, MBA, PMP, CLU, ChFC, FLMI, is a technical analyst at State Farm. He has more than 25 years' experience in organizations ranging from Fortune 25 corporations to specialty IT consulting firms. His responsibilities have included software development and testing, process improvement and re-engineering, project management, and executive assistance. He has a bachelor's degree in computing science from the University of Evansville (Ind.) and an MBA from the University of Illinois.

We have all been part of efforts that had to adapt to changing situations. For every effort, three factors are present: the style of the leader, the knowledge/experience of the subordinate or team, and the situation itself. Leadership style and team knowledge/experience were examined by Hersey and Blanchard[1] in the late 1960s. Their insights ultimately became known as "situational leadership theory."

The old saying goes that man plans and God laughs. That often seems to be how leadership pans out. Creating a plan is the easy part, but successful execution is a whole 'nother deal. Situational leadership always comes into play — whether it's working with technology changes, personnel ups and downs, or new legislation that may rock the world — there's always something that intervenes when a leader is trying to achieve a goal.

Situational leadership research found that because work can be handled in a variety of ways, the most effective leaders will employ a leadership style that complements the team's ability, experience and willingness to reach a goal. Leadership styles are broken into four categories: telling, selling, participating and delegating. The four team maturity levels are M1 — little or no ability/desire to reach the goal; M2 — willing, but unable to reach the goal; M3 — able, but lacking confidence; and M4 — experienced, willing and able to achieve the goal.

Why should you care about situational leadership? You should care because it allows you to achieve results more efficiently. Using the principles of situational leadership, you can examine a situation and influence or control the three factors mentioned above. For this article, we'll assume the situation is one variable that is completely beyond our control. Very frequently, that is not the case in real life. Setting that to the side, let's examine some examples of situational leadership at work.

- Let's say you lead the mail division of your company (you have for six years) and the U.S. Postal Service notifies you that it will be changing regulations for address service verbiage. While non-compliance will not shut down your company, compliance is necessary to remain eligible for postage discounts.
  - ♦ If your organization's mail department is staffed with members who fall within the M3 (able, but lacking confidence) or M4 (able/willing) maturity levels, it is likely that *any* of the four leadership styles can be used successfully for this situation. Fortunately, you will have the luxury of choosing the leadership style you prefer, or one that allows you to develop the leadership potential of subordinates.
  - ♦ If the mail department has everyone at an M1 (low ability/desire) or M2 (willing but unable) level, then a "telling" (specific instructions and expectations) or "selling" (instructions, teamwork and moral support) approach will help the effort's efficiency and effectiveness.
- If you've recently been appointed to manage an area where you have no expertise, you will be wise to identify subordinate employees with M3 and M4 maturity levels, and then use "participating" and "delegating" leadership styles as you lead your initial work and learn more about your new area. Likewise, when you have experience in the area and tackle complex assignments with experienced M3/M4 employees, you can use "participating" and "delegating" leadership styles to make the most of your knowledge and experience, as well as the team's knowledge and experience.
- In situations that mandate legal compliance, leadership must use a "telling" style to set expectations, but can enhance that with "selling, participating, and/or delegating" styles for execution to meet compliance goals. In fact, partnering with subordinates, rather than just delivering a mandate, will generally boost compliance and morale.

In hindsight, can you recall when you have used situational leadership? Probably so. In the future, deliberate use of situational leadership principles can increase your leadership efficiency and effectiveness. ■

Reference

(1) Hersey, P. and Blanchard, K.H. (1969). *Management of Organizational Behavior — Utilizing Human Resources.* New Jersey/ Prentice Hall

CPCU Society Service

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

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

As you're aware, our current economic environment has made many businesses return to their core services, making support for outside endeavors — such as the CPCU designation and CPCU Society service — a lower priority.

Because of this, it's crucial that each and every one of us be a champion for the support and promotion of the CPCU designation and volunteer service.

How can you help achieve this?

- Make your CPCU designation visible — use it on your correspondence and business card, and wear your pin.
- Highlight the *benefits* of the designation and the Society to superiors, co-workers, subordinates, other employers, and friends and family, as well as leveraging them for yourself.
- Embody the ethical and moral standards of the CPCU designation and Society to uphold the professionalism of the insurance industry and its careers.

I'd ask that you do your part every day to be a CPCU and help "Spread the Word!"

A crucial part of supporting and ensuring the success of the Society is *involvement*. The Society and your chapter only work and thrive due to your involvement. We have many great leaders, but everyone needs to constantly search for new leaders to keep efforts alive.

Local volunteers are what make chapters run and succeed. Show your employer your passion for personal development and improvement, and highlight your organization as a community leader.

In particular, I'd like to make a special appeal to you to get involved on a *Society level*.

I earned my CPCU designation in 2002 and immediately got involved in my local Nebraska Chapter, when at my conferment, the current Nebraska Chapter president asked me if I was interested in serving on its board as a director. I said "sure," and this was the beginning of my CPCU Society service career.

After that, I served in several positions, including Nebraska Chapter president in 2004–2005. While serving as president, I was approached by a colleague about getting involved in Society service. I had enjoyed my chapter service, so felt this was a great next step.

In 2005, I became a member of the Total Quality Interest Group, now called Leadership & Managerial Excellence. I later became chair and have recently ended my three-year term. Along the way, I've served on other groups and am currently serving a three-year term on the CPCU-Loman Foundation Board of Trustees. Beginning this fall, I will have new responsibilities as a chapter governor.

So what are some of the opportunities as a Society volunteer?

There are positions available in the Society for:

- Vice president, advancing to president — one position.
- Director — 18 positions.
- Secretary — one position.
- Treasurer — one position.
- Chapter governor — 34 positions, for a specific area of the U.S. or world, with rotating openings annually.
- Interest group committee member or chair — currently, 14 interest groups with more to be created.
- Standing committee member or chair for the Budget/Finance, Diversity, Ethics and Nominating committees.

Each of these areas has a three-year term commitment.

And lastly:

- Task force member or chair with objectives based on needs, with service terms of six to 18 months.

Besides the term commitment, there is the expectation that you attend the fall CPCU Society Annual Meeting and Seminars and the spring Leadership Summit, where the majority of business activities and planning for these groups takes place.

In addition, in between these face-to-face meetings, many groups have monthly or as-needed teleconference calls.

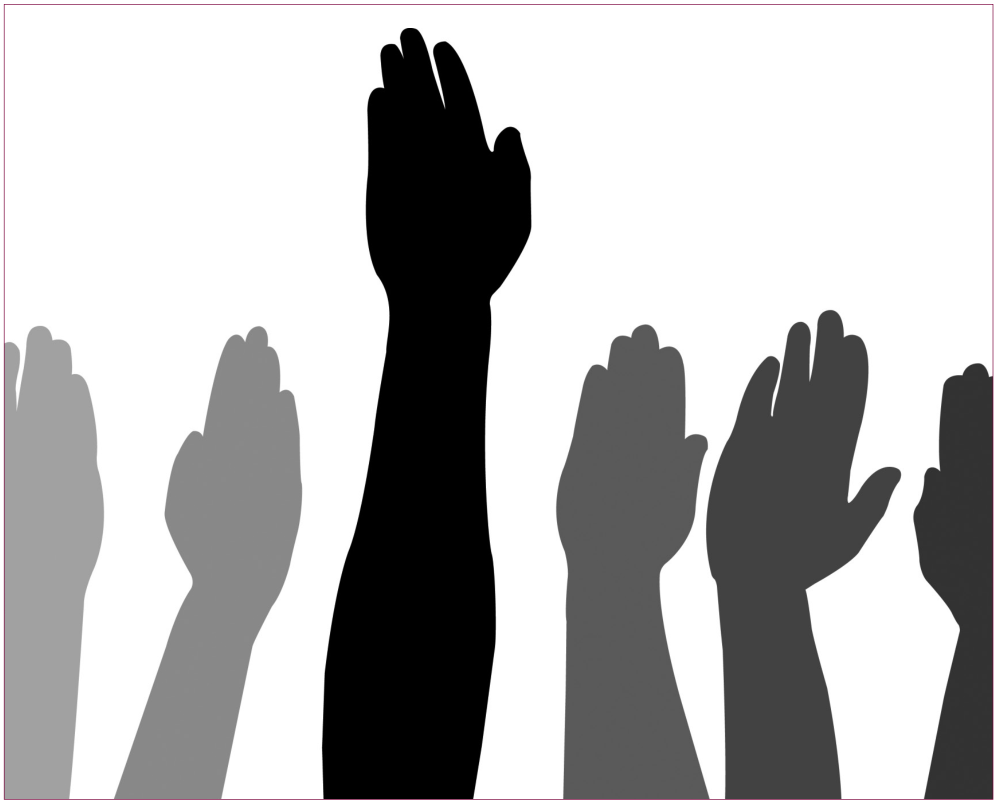
So how do you become involved?

- Become a dues paying CPCU Society member.
- Routinely attend local chapter meetings and events.
- Join and work on a chapter committee or become a chapter leader.
- Then join and work on a Society interest group, standing committee or task force.

And then…

- Become a Society leader!

So, if you've been involved in your chapter and are interested in Society service, complete an "Application for CPCU Society Service" along with a "Member Interest and Skills Profile" and submit them by the deadlines each year. To download an application or profile, go to www.cpcusociety.org, and click on "Members" and "Volunteer for CPCU Society Service." Applications are reviewed by the incoming president, and assignments made and communicated in June of each year.



In closing, my involvement in my chapter and the Society has been *fantastic!* It has expanded my organizational and leadership skills, provided paths for me to learn more about the insurance industry, and allowed me the great opportunity to meet and work with some of the best people in the world.

I'd like to end with a few *appeals:*

- Attend, and encourage others to attend, the Annual Meeting and Seminars, Oct. 22–25, 2011, in Las Vegas, Nev.
- Attend, and encourage others to attend, the Leadership Summit, April 26–28, 2012, in Miami, Fla.
- If you're currently involved in your chapter or the Society — *thank you, thank you, thank you and please continue to serve!*
- And if you're not currently involved — *get involved!* ■

NJBIZ Honors CPCU Society Member as One of New Jersey's Best 50 Women in Business

Editor's note: The Leadership & Managerial Excellence Committee would like to congratulate Rita Williams-Bogar, CPCU, ChFC, MBA, on being named one of New Jersey's 2011 Best 50 Women in Business. Williams-Bogar will present a seminar on "Terms of Engagement — Employee Engagement in Difficult Times" at the CPCU Society Annual Meeting and Seminars in Las Vegas. If you will be in Las Vegas, we hope to see you there.

Personal Development Solutions LLC and PDS Institute LLC are pleased to announce **Rita Williams-Bogar, CPCU, ChFC, MBA,** has been recognized by *NJBIZ*, New Jersey's weekly business journal, as one of New Jersey's 2011 Best 50 Women in Business.

Rita Williams-Bogar, CPCU, ChFC, MBA

The awards program honors the state's most dynamic women business leaders who are making a significant impact in their company, industry and community. An independent panel of judges selected the top 50 winners based on their dedication to business growth, professional and personal accomplishments, community involvement, and advocacy for women.

Williams-Bogar is president and CEO of Montclair, N.J.-based Personal Development Solutions LLC, which she formed in 2004 after a successful 25-year corporate career. Her mission is to share proven strategies to help her clients achieve personal and professional success. She travels throughout the United States and internationally identifying clients' needs, and authoring and facilitating customized workshops in subject areas, including "Emotional Intelligence," "Cultural Competency," "Leading a Multi-Generational Workforce" and "The Unique Perspectives of Women Leaders." She develops and implements strategic planning initiatives for her clients. Williams-Bogar is a frequent keynote speaker at professional conferences.

Following the success of Personal Development Solutions, she formed PDS Institute LLC in 2007 to provide educational services to the insurance industry.

She earned her bachelor's degree from Bryant University. She earned her MBA in finance and risk management, with honors, from Walden University, where she is pursuing her Ph.D. in management, concentrating in leadership and organizational change. She is a graduate fellow of Leadership New Jersey and a member of Sigma Iota Epsilon national management honor society.

Williams-Bogar serves as state vice president of diversity for the New Jersey Association of Women Business Owners. She is the executive director of the CPCU Society New Jersey Chapter and a member of Bryant University's Board of Trustees. She is a past president of the National Coalition of 100 Black Women Inc., Bergen/Passaic Chapter. ■

Bias — Don't Discard Your Biases and 'Gut'; Just Change the Way You Use Them

by Brad Kolar

Brad Kolar, president of Kolar Associates, has been helping organizations rethink how they work for nearly 20 years. Previously, he was the chief learning officer for the University of Chicago Medical Center (UCMC), and the director for learning and performance strategy for Accenture. He regularly writes articles on leadership, motivation and business strategy in his blog, "The Question of Leadership" (www.leaderquest.blogspot.com). He is the co-author of *The Brain Advantage: Become a More Effective Business Leader Using the Latest Brain Research*.

Data-driven decision making or gut-level decision-making, which is the answer? The pendulum has swung way over to emphasize data-driven decision-making. But isn't your personal experience and judgment (i.e., your "bias") what got you to where you are?

Your value as a leader comes from your experiences and judgments. If organizations could codify every decision into a predictable formula, leaders would be replaced with statistics packages.

Yet, your personal experiences and judgments, while successful in the past, may no longer be sufficient in a changing world. So, what can you do? The answer is that you need both: good data and a strong gut. However, you may need to change the way you use them.

Instead of using your bias to answer questions, use it to generate questions and let the data provide the answers.

Then, instead of using data to support your gut, use your gut to process the data.

Ultimately, all our decisions are gut based and biased. This is best illustrated in Jonah Lehrer's book *How We Decide*. Lehrer describes a man who, after having a tumor removed from his orbitofrontal cortex, couldn't make decisions (at least not quickly and easily). In the operation, some of the orbitofrontal cortex was also removed. The orbitofrontal cortex is the part of the brain governing emotion.

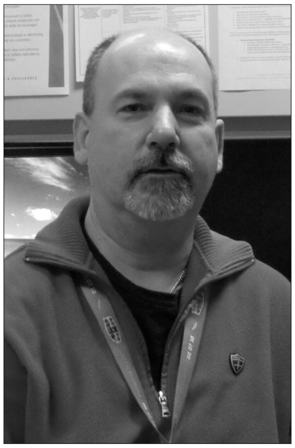
Why is it so hard to make an entirely fact-based decision? First, there is always more data. At some point, you have to make a judgment call. You must believe that you have a reasonable amount of data and a sound argument. Otherwise you'll be searching endlessly. Second, treating every fact equally thwarts effective decision-making. You must determine which data matters most. This comes from your experience. Finally, few problems have a single right answer. Two people looking at the same dataset can come to vastly different conclusions based on their experience with similar data. And, both might be right. A surge strategy and a withdrawal strategy are probably equally viable ways of resolving the conflict in Afghanistan. It's not that one is right and one is wrong. Both have their merits and their issues. To determine which is the "right" answer, people must use their experiences, biases, and gut to put the data into a broader context.

In today's world, the "right" answer isn't some form of absolute truth. Rather, it is the one based on a sound, logical argument that is supported by facts (with the realization that there might be an opposing view that also has a sound, logical argument supported by facts).

This isn't to say that every decision and every opinion is equally viable. People make bad and misinformed decisions. Good leaders need to learn how to harness their gut and biases rather than blindly following them. I am not advocating that we swing the pendulum back the other way. My point is just that we can use data to confirm or refute our biases/gut, and we can use our gut/biases to put the data into a broader context. ■

People to People Ambassadors — Insurance Professionals Delegation to China

by Eric W. McIntyre, CPCU, AINS, AIT



Eric W. McIntyre, CPCU, AINS, AIT, is a claim automation and procedures specialist with State Farm in Harahan, La. He is secretary of the CPCU Society Deep South Chapter.

Editor's note: This article originally appeared in the CPCU Society's April 2011 Personal Lines Interest Group newsletter.

Twenty delegates and six guests, including my wife, flew 13 hours from San Francisco, Calif., to Beijing, People's Republic of China, in November 2010 to begin a nine-day journey of professional and personal discovery. Despite the 11-hour time difference, jet lag didn't become an issue until our return to the U.S., probably because we were too busy to feel it. I had done some reading on Chinese culture and etiquette, learned a little (very little) Mandarin, and was excited about our first trip outside the Western Hemisphere.

The trip was organized by People to People International (PTPI), and the delegation was led by CPCU Society 2008–2009 President and Chairman **Marvin Kelly, CPCU, MBA,** and included The Institutes' President and CEO **Peter L. Miller, CPCU.** Nearly all the delegates (primarily consultants, agency executives, and insurance company management and specialists) possess the CPCU designation and represent a variety of insurance areas, including property-casualty underwriting, property-casualty claims, workers compensation and supplemental markets.

Tiananmen Square in Beijing, China

The goals of the trip were to meet and exchange information and ideas with other insurance professionals, educators and government officials; work to establish lasting relationships and goodwill; and network and foster new friendships within the delegation. The itinerary changed somewhat at the last minute (no meeting with government officials), but the trip was no less special — and frankly, astonishingly productive. On our first full day in Beijing, we spent a half-day learning some history and geography of China from our national guide, and the history and current state of the Chinese insurance market from a law professor at Beijing's University of International Business and Economics.

Over the next few days, we met with leadership from Chartis Insurance (formerly AIG) to discuss Chinese domestic and international insurance facts and trends, and with representatives of the People's Insurance Company of China (PICC), the nation's largest domestic insurer, who had never before met with any Western counterparts. (A translator was needed.) In Shanghai, we met with representatives from ACE and Huatai Insurance Companies (partnering to take advantage of each other's strengths) to discuss commercial risk management and insurance in both domestically and Chinese-run overseas operations.

I have worked for State Farm for more than 30 years (I started really, really young), and if I have an expertise, it is in the area of catastrophe preparation and response. Living and working in California, and in the New Orleans area since 1993, has provided much experience with catastrophic events. I have spent thousands of days on temporary assignment in 25 states working as a claim representative, re-inspector/trainer, supervisor and more recently, in my current capacity, helping to create, coordinate and supervise the electronic and physical environments


Pudong Financial District in Shanghai, China

that allow claim handlers to do their jobs. So, I was grateful to be asked to pass along some of my knowledge to PICC, which has limited experience in this area.

We also met with the dean and several professors of the economics department at Peking University, and doctors and administrators of Lihuang Hospital's 800-bed wing devoted to Traditional Chinese Medicine (TCM), part of Shanghai University. One of the highlights of the trip was touring the hospital, including a TCM treatment room, where we saw a variety of TCM therapies being applied (e.g., acupuncture, massage and cupping), as well as a large herb processing and distribution center.

There were cultural outings as well, including Tiananmen Square, The Forbidden City, The Great Wall, a traditional tea ceremony, martial arts and acrobatic performances, and a fabulous visit to a senior center and "university," which essentially is a retirement home where there is no shortage of things to keep one busy. We also had great adventures in the cuisine department, as traditional Chinese cuisine is somewhat different than that eaten in the U.S. Eel and jellyfish are common at meals, and the food choices and flavor as well as the order of service are quite different in Shanghai as compared to Beijing. On Mandarin duck night, a few of us even partook of fried scorpion.

But professionally what surprised us (perhaps it shouldn't have) is how well respected the CPCU brand is in China. The dean and professors we met with at Peking University literally gasped at a show of hands from all the CPCUs in the conference room. One of the takeaways was an agreement to explore adding CPCU curriculum to their programs, allowing graduates to simultaneously earn their degree and their CPCU designation. And in Shanghai, the American consultant for ACE, as well as several Huatai employees, have and value the designation. They believe there are now enough CPCUs in Shanghai to start the first chapter in China, and Marvin Kelly and Peter Miller will work with them to make it happen.

All told, it was a trip that will leave lasting memories, and the new friends and new knowledge made the experience much more than either a vacation or a business trip. I was the official delegation "journalist," and anyone interested can read the full journal that has been posted on the PTPI website (www.peopletopeople.com) and view presentations made by some of our counterparts in insurance and health care.

From the PTPI home page, click on "Adult Programs" and then "Journals;" in the drop-down menu, click on "Business" and then leader Kelly's name. The journal provides a more comprehensive look into the Chinese insurance market, its regulatory structure and environment, and some perspectives on China's legal and business standards.

If anyone has questions or wants to learn more about my experience, or this type of travel, I can be reached at eric.mcintyre.aoiu@statefarm.com. ■

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CPCU Society
720 Providence Road
Malvern, PA 19355
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Chair
Kimberly A. Sterling, CPCU, CLU, ChFC, AIM
State Farm
Email: kimberly.sterling.gdpd@statefarm.com

Co-Editor
Janice Hendricks, CPCU
State Farm
Email: janice.hendricks.gsfn@statefarm.com

Co-Editor
Sandra L. Jones, CPCU, CLU, ChFC
State Farm
Email: sandy.jones.ccoj@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

Production Manager
Joan A. Satchell, PPPC

Design
Susan B. Leps