

The CPCU Society **Strategic Plan**

2012

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**We will be the premier professional association
for those in risk management and insurance.**

Our Vision



We will be **the premier professional association**
for those in
risk management and insurance.

Our Vision
The CPCU Society
will be the industry's
premier association.

Our Values



We are committed to the following values and strive to reflect them in our activities.

Open Communication: We will listen to, learn from, and collaborate with our members and each other to ensure that we understand how best to meet needs. We will act and communicate as a unified organization.

Constructive Change: We will cultivate an environment that anticipates and embraces change. We will encourage employees to be innovative.

Excellence: We will strive to ensure that the products and services provided by the CPCU Society are of the highest quality.

Dignity and Value of Each Individual: We will create a workplace that is free from prejudice and discrimination. We will promote an environment in which every employee is encouraged to strive to reach his or her full potential.

Participation in Decision Making: We will provide employees with appropriate access to information and input into the decision-making process.

Ethical Conduct: We will promote the highest standards of ethical behavior in the workplace.

Our Values

We recognize that values influence how we conduct ourselves with both our members and our colleagues.

Our Mission



We are committed to providing resources, educational programs, and leadership opportunities that **attract talent and enable individuals to expand their technical insurance skills and business capabilities** in order to **improve the overall performance of the insurance industry** while adhering to the **highest ethical standards.**

Our Mission

We are committed to improving our industry, its employers, and its professionals.

Our Strategy



The CPCU Society is the leading professional association for those in the risk management and insurance industry.

We will maintain our leadership position by:

- Providing access to technical insurance knowledge on current industry issues
 - Providing opportunities to apply the current technical insurance knowledge to individuals' own situations
 - Providing access to current technical insurance knowledge and networking using local chapters and interest groups
 - Providing access to current technical insurance knowledge by promoting CPCUs as mentors and subject matter experts
- Promoting the professional qualifications of CPCUs and the CPCU designation
- Promoting risk management and insurance as a career

Our strategic goals will enable us to:

Provide relevant knowledge.

Empower professionals to succeed.

Engage future generations of leaders.

By providing members access to needed technical knowledge on current industry trends, promoting the professional qualifications of CPCUs, and promoting our industry as offering rewarding career options, we will increase the value we provide to our members, their clients, their employers, and our industry as a whole.

Strategic Goal 1:
Provide Relevant Knowledge



To achieve this strategic goal, we will:

- Provide access to technical insurance knowledge on current industry issues
- Provide opportunities to apply the current technical insurance knowledge to individuals' own situations
- Provide access to current technical insurance knowledge and networking using local chapters and interest groups
- Provide access to current technical insurance knowledge by promoting CPCUs as mentors and subject matter experts

Knowledge

We will provide members access to technical knowledge on current industry trends and opportunities to apply this knowledge.

Strategic Goal 2: **Empower Professionals to Succeed**



To achieve this strategic goal, we will:

- Promote the professional qualifications of CPCUs

Empower

We will empower members to succeed by promoting the knowledge, integrity, and value of their professional qualifications as CPCUs.

Strategic Goal 3:
Engage Future Generations of Leaders



To achieve this strategic goal, we will:

- Promote risk management and insurance as a career

Engage

We will engage future generations of leaders by promoting the value of what our industry does for individuals, as well as society.

Our Future



Strategic Goal 1—Provide Relevant Knowledge

We will achieve this strategic goal in 2012 by meeting or exceeding targets for:

- Hours of technical insurance education delivered
- Number of individuals taking their first CPCU exam
- Total paid attendance at the Annual Meeting and Seminars

Strategic Goal 2—Empower Professionals to Succeed

We will achieve this strategic goal in 2012 by meeting or exceeding targets for:

- Total Society members (also on The Institutes' scorecard)
- Membership conversion rate for new CPCUs
- Membership retention rate
- CPCU professional recognition index



Strategic Goal 3—Engage Future Generations of Leaders

We will achieve this strategic goal in 2012 by meeting or exceeding targets for:

- Insurance career desirability index

The Circle of Excellence program will measure the success of chapters in achieving our strategic goals.

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