

INTERNATIONAL  
INSURANCE  
INSTITUTE, Inc.



# Course Catalog





## About International Insurance Institute, Inc.

### Training

“In life it is training rather than birth which counts”

-Ihara Saidaku, 1679

At International Insurance Institute, Inc., we believe educational classes help increase knowledge, but a change in behavior only comes with training. Knowledge, without a change in behavior, produces little results.

That is why all training courses provided by International Insurance Institute, Inc. include time for the students to practice and understand how to put into use their newly acquired knowledge and skills. Real-life problem solving exercises, scenarios, role-plays and other such practice devices are used to help the students experience the results their new knowledge and skills will produce.

The goal of our training is to produce results. In every training session, regardless of the subject matter, we consider ourselves coaches. A coach has a vested interest in the success of their team. We work hard to deliver training courses that produce results, because we have a vested interest in our students performing well.

All instructors at International Insurance Institute, Inc. are successful managers and understand the investment being made when claims people attend training classes. We know the importance of producing results through training.



#### What Makes Our Training Different:

If you can't come to us, we'll come to you! For fifteen students or more we will come to your location and train on-site anywhere in the world.

All instructors are experienced claims managers and certified instructors that specialize in real life claims applications.

All workshops described in this catalog can be modified to be specific to Underwriting, Operations, Agency, Legal, Subrogation, or any other department.

## Leadership Team



**Carl Van, ITP, President & CEO of International Insurance Institute, Inc.**, graduated from California State University, Sacramento where he received his bachelor's degree in Insurance. He has been in the insurance claims industry since 1980 and has held various staff, management and executive positions including Vice President/General Manager.

Mr. Van has written articles for Claims magazine, Claims Education Magazine, Claims Advisor, Claims People magazine, The Subrogator, The National Underwriter, California Insurance Journal and over 100 other national magazines. He is the author of over 75 technical and soft skill workshops being taught throughout the U.S., Canada, Australia and the U.K. He has been a trainer at an international U.S.-Japanese executive training program, a guest speaker at hundreds of claims association seminars, and selected as the opening presenter at some of the most prestigious claims conferences in the United States and Canada.

Mr. Van is the Dean of the School of Claims Performance, and has served as both board member and Regional Vice President of the Society of Insurance Trainers and Educators. He is owner and publisher of Claims Education Magazine, and board president of the Claims Education Conference. He is creator, presenter and producer of all claims training videos at Claims Education On Line, which include Time Management, Customer Service, Negotiations and Critical Thinking, all specific to claims professionals.

Mr. Van is owner and publisher of Claims Professional Books On Line, and is the author of the highly acclaimed book The 8 Characteristics of the Awesome Adjuster, which has sold internationally throughout the United States, Canada, Guam, Singapore, France, Australia, England, Chile, Ireland, and 25 other countries. Other books by Carl Van include Gaining Cooperation, The Claims Cookbook, Attitude, Ability and the 80/20 Rule, The Eight Characteristics of the Awesome Employee, Negotiations Skills for the Claims Professional and Awesome Claims Customer Service.

He writes all materials for his Carl Van Claims Expert blog, and provides claims tips on his Carl Van Professional Speaker You Tube channel. Just for fun he writes all lyrics to the songs performed by Carl Van and the Awesome Adjuster Band. Other credits include being an arbitrator, a TASA expert witness for insurance Bad Faith suits, as well as a national auditor for a federal regulatory agency.



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[www.Linkedin.com \(Carl Van – Awesome Adjuster group\)](https://www.linkedin.com/groups?gid=11111111)

[www.ClaimsEducationConference.net](http://www.ClaimsEducationConference.net)  
[www.ClaimsEducationMagazine.com](http://www.ClaimsEducationMagazine.com)  
[www.ClaimsProfessionalBooks.com](http://www.ClaimsProfessionalBooks.com)  
[www.YouTube.com/carlvantv](https://www.youtube.com/carlvantv)



## Leadership Team



**Dave Vanderpan, Director of Claims Training of International Insurance Institute, Inc.**, graduated from University of California at Davis with Bachelor degrees in both International Relations and Economics.

He has been in the insurance claims industry since 1986, and has held the positions of Claims Adjuster, Claims Supervisor, Claims Manager and Regional Claims Manager.

Mr. Vanderpan has been training claims professionals for over 25 years, and has developed and presented many in-house training sessions. He has conducted over 500 training classes in over 40 states throughout the U.S., and has been a featured speaker at conferences in Canada, and England.

Mr. Vanderpan helped develop the material and presentation format of the most successful class offered by the International Insurance Institute, Inc., the popular Awesome Claims Customer Service which was featured in Claims Magazine.

He is the author of numerous successful workshops offered at the annual Claims Education Conference including the highly respected Litigation Management and the fun packed Team Building Games for Claims.

Mr. Vanderpan has been the subject of many articles regarding exceptional claims performance, and featured in Claims Education Magazine.

He is co-presenter of the Negotiation Skills for Claims Professional online training course available at [www.claimseducationonline.com](http://www.claimseducationonline.com)

Mr. Vanderpan is member of the Society of Insurance Trainers and Educators and has been a member of the National Association of Independent Insurance Adjusters. He has extensive knowledge in the fields of coverage and defense litigation covering almost all states.



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## Leadership Team



**Teresa Headrick, ITP, Director of Course Development, International Insurance Institute, Inc.** has been in the insurance industry since 1977, leading to management and learning/development with a staff of training consultants, quality assurance specialists and business development managers.

She has served on several strategic leadership councils, collaborating with other training leaders to meet the current development goals of the insurance industry.

Ms. Headrick earned her ITP (Insurance Training Professional) designation from the Society of Insurance Trainers and Educators (SITE) and her CPLP (Certified Professional in Learning and Performance) designation from the American Society for Training & Development (ASTD), specializing in Human Performance Improvement.

She has held several Board positions with SITE, including President. She also served three consecutive terms as President of her regional chapter of ASTD.

Ms. Headrick has been a guest speaker at numerous insurance association meetings, and a featured instructor and course designer at the annual Claims Education Conference.



She specializes in identifying and leveraging natural talents for any size organization or team using “StrengthsFinder 2.0 – Discover Your CliftonStrengths” She is widely considered the leading industry expert in guiding organizations on how to discover and apply strengths, putting them to work to strengthen individuals and teams.

Ms. Headrick’s corporate management experience, her senior leadership roles with national and local societies, and her commitment to the insurance industry, make her uniquely qualified to write and train on the subjects of leadership and employee development.

Other credits include being a licensed insurance broker, and co-authoring Negotiation Skills for the Claims Professional, offered at [www.claimsprofessionalbooks.com](http://www.claimsprofessionalbooks.com).

[www.InsuranceInstitute.com](http://www.InsuranceInstitute.com)  
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# Awesome Claims Customer Service

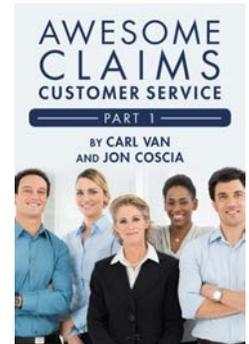
The overall focus of the Awesome Claims Customer Service full-day workshop is to improve the customer experience throughout the claims process, in order to increase customer satisfaction and reduce claim expense through improved interpersonal skills and claims handling efficiency.



Claims professionals are taught specific skills to accomplish these goals, and make their jobs easier and more satisfying. They also learn some real-life skills on how to gain customer trust, reduce customer anxiety, reduce phone calls, improve the customer's perception of how they are being treated, and make the claims job easier.

Attendees learn how to:

- Apply the five standards of great customer service companies
- Define excellent customer service and apply into everyday interactions
- Reduce the volume of incoming and outgoing phone calls
- Recognize that customer service is their job
- Reduce customer anxiety and increase customer patience
- Improve the customer's perception of the service they have received
- Gain customer trust
- Build trust with the customer and manage the relationship
- Deliver bad news with empathy and understanding
- Avoid the "Claims Hammer"
- Set, meet and exceed customer expectations
- Have a positive attitude toward the customer
- End the "Question after Question" cycle
- Listen effectively- knowing what the customer really wants
- Make the empathic connection
- Help the angry customer





## Awesome Claims Customer Service - The Next Level

This full-day workshop is intended as a direct follow up to the Awesome Claims Customer Service workshop. It is designed to build upon the basic customer service building blocks previously set down, and develop new, high level customer service techniques to improve results.



Claims professionals learn to appreciate a sense of responsibility for ones own development and foster initiative. They will better understand customer's reactions to demands and incorporate them into file resolution. Focus is placed on identifying common survey results and comments, and looking for ways to improve results.

Attendees learn how to:

- Deal with the stress that can be experienced in claims
- Reduce self-induced stress
- Incorporate the strengths of the best claims people
- Appropriately manage complaint calls exercise
- Maintain customer service during negotiations
- Provide empathy (The power tool of customer service)
- Present settlement figures with concern for the customer
- Help the assertive/demanding customer
- Improve customer service letter writing basics
- Convey bad news tactfully
- Say things the right way
- Improve their professionalism
- Understand the connection between attitude and customer service
- Avoid telephone techniques that lower the perception of customer service





# Real-Life Time Management for Claims

This is a practical, full-day workshop, which includes real-life scenarios geared specifically toward the claims professional.

Claims professionals use their own issues and barriers in problem solving exercises to focus on result oriented activities. Students leave with practical methods for improving time management, which they can put into place right away.



Customer service is strongly emphasized throughout the day. This course is designed to aid the claims professional by developing practical time management skills.

Attendees learn how to:

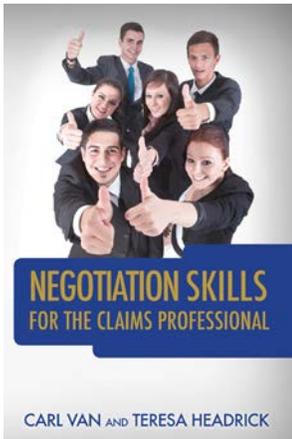
- Overcome procrastination by breaking up large projects into “bite size” pieces
- Eliminate work by focusing on those things that get worse with time
- Reduce phone calls by improving the telephone interaction with the customer to make sure they are listening and can remember what they were told
- Prioritize effectively by identifying those high impact items that keep them in the “20% time – 80% results” category
- Plan properly by looking at all of the items at one time and ranking them accordingly
- Construct a “working” to-do list to help avoid feeling interrupted during the day
- Manage incoming correspondence by only handling things once
- Manage diary by picking an effective strategy given the work-flow
- Manage telephone interruptions by being proactive in planning phone calls
- Leave work problems and stress at work





# Negotiation Skills for the Claims Professional

Being an effective claims negotiator requires knowledge of the claims file, the ability to display empathy for the customer, and interpersonal skills to have the customer agree we are paying a fair amount.



When negotiating with attorneys, it requires making a good case for the strengths, minimizing the weaknesses, and avoiding the games others like to play. That means learning how to keep focus on the value of the case and not getting tricked into talking about demands.

In this full-day workshop, empathy, listening skills and customer service are utilized as tools in setting up improved negotiations. This presentation is light on textbook theory and heavy on real-life claims negotiation situations. Role-plays and exercises are all specific to the insurance claims business.

Attendees will learn:

- Great claims negotiators vs. everyone else
- The three critical factors in claims negotiations
- The five claims negotiations maxims
- The five-step claims negotiation process
- How to present settlement figures the correct way
- The fastest way to gain trust
- How to avoid the “claims hammer”
  - » How to say things the correct way
  - » Words and phrases you should never use in claims
- How to be persuasive
  - » Getting the other person to listen to you
  - » Getting the other person to consider your point of view
  - » Staying in “your conversation”
- Negotiating with an attorney
  - » Developing strengths and presenting them well
  - » Minimizing weaknesses
  - » Effective counter arguments





## StrengthsFinder 2.0

### Identifying and Leveraging Strengths

This full-day workshop is designed to introduce your organization to StrengthsFinder 2.0 – Discover Your CliftonStrengths, guiding senior leadership, management and staff to launch their “strengths journey,” and discover natural talents to inspire an engaged, positive and productive environment.



Using the assessment results, students experience activities to cultivate the strengths culture and demonstrate the diversity of natural talents. Prior to class students complete the on-line assessment. During class, they receive their customized Strengths Discovery and Action-Planning Guide, including Strengths Insights.

As part of a team exercise, the team views all of the staff strengths. Activities are designed to cultivate the strengths culture, demonstrate diversity of natural talents and inspire a positive and productive environment.

Attendees learn how to:

- Recognize the concise behaviors that link directly to their strengths learned from the Gallup online assessment
- Identify how those behaviors manifest every day, at work and at home
- Manage their time by moving quickly beyond their barrier behaviors to a more productive process
- Build mutual respect by understanding the strengths of individuals in their organization and how to work best together
- Use that respect to work better with individuals with opposing strengths
- Develop their strengths to better themselves and their organization
- Become part of a diverse yet well-functioning team with consistent goals



# Critical Thinking for Claims

This full-day workshop is designed to teach not only the benefits of critical thinking but also how to put critical thinking to work when making claims decisions.

Claims people are taught how to make good decisions based on cautious review, work through problems to find the best answer, stay focused on the real issues, and apply critical thinking to investigations.



Further discussion is focused on applying the learned skills to claims situations (coverage analysis, reporting, etc.) and using critical thinking when developing plans of action for claims handling.

It is not about always being right. It is about testing assumptions, thinking things through, considering the relevant information, avoiding the pitfalls, and making the best decision possible.

Attendees learn how to:

- Think things through, test assumptions, and make the best decisions possible
- Apply critical thinking skills to review the facts of a claim and develop a tailored approach toward a thorough liability, coverage, and damages investigation
- Avoid the pitfalls of non-critical thinking
- Identify possible deception during the investigation (including taking recorded statements) which may require more investigation and follow-up
- Modify the existing claim investigation plan based on pertinent facts by applying critical thinking skills toward the new information developed during the investigation
- Logically and accurately reconstruct all aspects of the loss through a careful analysis
- Recognize and evaluate statements, conclusions, and arguments



## Dealing With Difficult Customers

Dealing with Difficult Customers workshop is designed especially for claims professionals.

Staying effective during unpleasant situations is the hallmark of the most successful customer service people.

The main objectives of this course are to explain the psychology that governs upset customer behavior, suggest steps to take after the customer is gone, present strategies for successful customer encounters, and advise customer service people about their actions and attitudes.



Attendees learn how to:

- Avoid upsetting customers in the first place
- Recognize why customers get upset
- Avoid using “trigger words” that upset customers
- Calm upset customers
- Gain valuable information from upset customers
- Diffuse defensiveness
- Properly follow up
- Understand customer demands and complaints
- Deal with the snide comment
- Deal with the assertive/demanding customer
- Deal with the angry customer
- Deal with the talkative customer
- Deal with the unreasonable customer
- Gain customer cooperation
- Gain customer trust





# Negligence and Legal Liability

A full-day workshop covering the basics of the creation of legal liability.

The separation of liability versus coverage are reviewed along with necessary terminology such as clear liability, probable liability, questionable liability, strict liability, vicarious liability, etc. The goal of this workshop is to increase the claims professional's ability to apply known facts and develop a theory of liability.



Students are given case scenarios and work in teams to analyze the level of liability based on the theories of negligence they develop. This helps sharpen their investigative abilities as well as critical thinking skills.

The goal of this seminar is to have students appropriately analyze negligence factors and develop legal liability theories.

Topics include:

- Legal liability - by contract; by statute; by tort
- Torts – committing a civil wrong
- The five elements of negligence
- Negligence application
  - ◇ Pure comparative
  - ◇ Contributory
  - ◇ Modified contributory
- Defenses to legal liability
  - ◇ Last clear chance doctrine
  - ◇ Emergency defense
  - ◇ Act of God
  - ◇ Unavoidable accident
- Separating liability from coverage



Note: Half-day workshop is available if the working case scenarios are removed.



## The 8 Characteristics of The Awesome Adjuster

This full-day workshop is based on the highly acclaimed book The 8 Characteristics of the Awesome Adjuster, which has sold over 250,000 copies in the U.S., Canada, Australia, Singapore, France, India, England, Ireland and over 25 other countries worldwide.

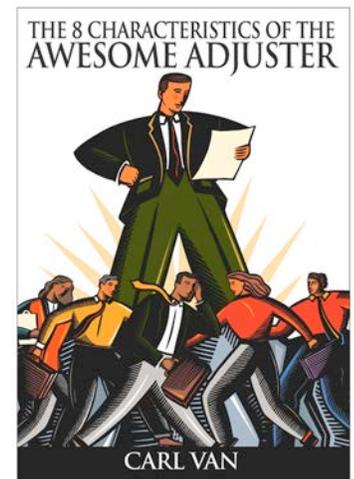


Awesome performers are a very diverse group; all personalities, educational backgrounds and intellectual levels are represented. As different as they are, however, they also have a great deal in common. This workshop outlines the characteristics, skills and attitudes that these individuals have in common that make them superior claims professionals.

Students are presented with the basic concepts of the characteristics, and then given team scenarios to solve and exercises to complete. Role-plays and very interactive exercises help reinforce the learned skills which will help any claims professional improve customer service, reduce the amount of work they do, increase their level of job satisfaction and make their job easier.

Topics include:

- Desire for Excellence
- Time Management
- Customer Service and Empathy
- Continuing Education
- Attitude
- Initiative
- Teamwork
- Interpersonal Skills



Note: Each topic requires two hours. Please choose any four topics to be covered in class. For all eight topics, two full days are required.



## Effective Recorded Statements

A full-day workshop designed to increase the effectiveness of recorded statements being taken. This full-day version includes a detailed discussion of the application of negligence and legal liability.



Practice scenarios and role-plays are utilized throughout the day to increase effectiveness in one of the most important evidence preserving functions performed by claims professionals. The goal of the course is to increase the effectiveness of recorded statements by developing proper outlining and fact-finding strategies.

Attendees learn how to:

- Apply the elements of negligence toward legal liability
- Keep an eye out for defense strategies
- Gain increased confidence in assessing liability
- Use facts and negotiation skills to apply shared liability
- Improve their listening skills
- Recognize indicators of possible deception
- Keep an open mind – watching out for “Opposite Blindness”
- Gain cooperating when requesting to take a statement
- Improve their listening and analysis/deductive reasoning skills
- Develop follow-up questions by listening to the answer
- Recognize subrogation opportunities and obtain the detail needed



Note: A half-day version of this course is available without the discussion of negligence and legal liability. It focuses only on the improvement of the recorded statement itself.



## Understanding Claims for Non-Claims People

A full-day workshop designed to enhance the understanding of the claims department's role for non-claims professionals.



Subjects include the claims department's objectives, the claim department's functions, the claims professional's duties and responsibilities, fields of knowledge and attributes.



A portion of the day is set aside to answer questions regarding the operations and procedures of claims functions. The goal of this workshop is to increase the non-claims person's awareness and understanding of just how a claims operation works.

Topics include:

- Major departments and functions of insurance companies
- How insurance contracts work
- How claims adjusters analyze coverage
- How claims adjusters determine liability
- Major obligations of claims departments
- Life cycle of a claim
- Claims terminology
- Basic claims jobs
- Standard for choosing vendors
- Why vendors are removed from approved lists
- How to be seen as indispensable
- ALWAYS do this
- NEVER do this
- Getting on the good side of a claims organization



Note: A half-day version of this workshop is available should any topics not pertain to your needs.



## Social Styles Inventory

A half-day workshop designed to define outward, observable behaviors of customers and co-workers and how those ‘Social Styles’ impact the success of teams and organizations.

After the class, students will be able to define ‘Social Styles’ and describe the prime factor in job success.

They will also be able to consider behaviors of those vital to success; describe what “Social Style” differences mean; identify the layers of personality and describe the model measurers.



They will complete the “Behavioral Inventory” assessment; interpret the “Social Styles Inventory” to identify personal primary and secondary styles; discover deep characteristics of each style; use “Social Styles” to appreciate the behaviors of customers and co-workers; work better as a team toward positive business outcomes, and reach greater success in all interactions and relationships.

## Listening and Empathy Skills



A half-day workshop designed specifically to improve communication by enhancing listening skills and developing empathy abilities.

It has been said that the ability to listen and empathize with a customer is 70% of ultimately solving any problem that can arise. Practice exercises, role plays and real-life scenarios are utilized in this highly interactive, practice based workshop.

It will improve listening skills and result in both an increase in customer satisfaction and decreased effort. This course will help the student learn how to expand their listening abilities and become a more effective communicator.

It will teach how to take in greater amounts of information, and remember more while “hearing between the lines.”



## Business Writing Skills

A half-day workshop designed to help claims professionals develop the ability to write clear, concise business letters, memos, file notes and reports. This includes the “do’s and don’ts” that will help make a more persuasive communication.



The elements to well-written sentences and organized thoughts are covered in detail. This is especially important in the claims professional position since quite often it is the claims professional’s letter that is used as a tool in the developing stages of claims handling.

Throughout the course the concept that claims is a customer service business is constantly reinforced, and that claims letters should always reflect a level of courtesy and concern for customers. “This concludes this matter” is quickly changed to “It has been a pleasure assisting you.” The goal of this workshop is to enhance the level of business writing for the claims professional in the areas of professionalism and persuasiveness.

## Proper File Documentation



A half-day course that is designed to improve claim file documentation. While adjusters can do many things to enhance the culture and commitment of the service they are trying to provide, probably the most important is file documentation. There is very little that will determine the direction a claim takes more than file documentation. The issue isn’t just “is there documentation in the file?” but “is the documentation an accurate reflection of the claim?” The answer depends heavily on the file’s documentation quality and timeliness.

Good file documentation can help resolve issues that may arise when there is a misunderstanding between the customer and the adjuster.

Topics include: file documentation as a reflection on the company, the importance of clear, concise and unambiguous file documentation, common claims standards for file documentation, nine most common claim file documentation errors, and final tips for file documentation.



# Teaching and Coaching for Managers

This full-day course is specifically designed for supervisors and managers to increase the results of the training they provide. The course provides background and insight into how employees learn best, how to measure results, how to identify a training issue, and what to do before and after training. It also includes leadership and motivational techniques to help inspire employees to want to improve.



Many excellent employees move into supervision because they were good at their jobs. They have strong technical skills and are promoted because of those skills in addition to demonstrating some leadership qualities. Once in this new position, they find themselves with an entirely new set of skill requirements and demands for which they are not fully prepared. At the top of that list is the ability to train others in an effective manner.

This course is appropriate for all levels of claims management desiring improved skills in the areas of teaching and coaching.

Topics include:

- Management's role in employee development
- Basics of adult learning
- Identifying development needs (is it a training issue?)
- Setting training objectives
- Effective coaching techniques
- Identifying comprehension and follow-up
- Keys to effective training
- Things to avoid when training
- Inspiring employees to improve themselves
- Three critical tools to individual development
- Training absolutes for managers





# Management Skills for Managers



This two-day course is appropriate for all levels of management. Attendees will benefit from the discussion of what drives employee performance and how to use that information to drive up one's own performance.

What are the key concepts to effective leadership? How do we motivate our employees? Who makes the best performers? 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? How do we inspire them to improve themselves? 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, answers those questions and many more.

## Day 1

8:30am – 12:00pm

Leadership quiz

Free book challenge

Who makes the best performers?

Attitude, ability and the 80/20 rule

95% of performance problems causes

Driving up employee performance

1:00 - 4:30pm

Critical elements to effective coaching

How to tell if you have a training issue

Management's role in training

Determining training objectives

Role contrast: Trainers vs. Managers

## Day 2

8:30am – 12:00pm

Change management concepts and tips

Making sure change sticks

Understanding the basics of adult learning

The only information source you can trust is...

Leading by example – good enough?

Being a beacon

1:00 - 4:30pm

Inspiring improvement

Common barriers to getting things done

Planning and to-do lists

Effective prioritization

Managing employee interruptions



# Leadership Concepts for Leaders

This is a leadership course consisting of six separate full-day workshops. It is designed to provide a well rounded variety of leadership topics. Workshops are typically scheduled anywhere from two to four months apart.



The workshop is very interactive. Attendees are split into teams for the day. During the day, they will work together to discuss the concepts, practice the learned skills, as well as solve case studies and scenarios. For each workshop, new teams are formed.

In order to keep the information fresh and encourage application of the learned skills, between workshops, each student will be asked to do the following:

- Complete a short quiz on the material covered in the workshop
- Review and answer a case study
- Attend a 1-hour webinar conducted by an III facilitator reviewing the material
- Read a summary of concepts and questions answered during the last workshop
- Prepare a list of questions about the topics for the next workshop
- Describe successes and challenges in applying the newly learned skills in a short brief to be reviewed by the facilitator
- (optional) Read a book or periodical suggested by the facilitator

Any of these activities can be expanded upon, reduced, or even eliminated based on your request. All of these extra-curricular activities are included in the workshop pricing by International Insurance Institute, Inc.

Individual workshop subjects:

Leadership  
Personal Effectiveness

Teaching and Coaching  
Employee Development

Motivation and Change  
Time Management

**For a complete outline and specialty pricing for this course, please download our 12 page brochure at [www.InsuranceInstitute.com/downloads](http://www.InsuranceInstitute.com/downloads).**



# Time Management for Claims Supervisors and Managers

A full-day workshop which includes real-life scenarios geared specifically toward claims supervisors and managers.



Claims supervisors and managers have a unique demand upon them to be not only good managers, but also technical experts. It is almost like having two jobs. Many time management issues arise because of these demands, and are specific to the claims supervisor and claims manager.



During the day, participants are involved in group discussions, role-plays, team exercises and self-evaluations. Participants leave with some very practical methods of improving time management that they can put in place right away, as well as some methods that require further development.

Attendees learn how to:

- Teach their staff how to reduce phone calls
- Teach their staff how to reduce complaint calls
- Teach their staff how to meet and exceed customer expectations
- Develop a bias for action and overcome procrastination
- Develop an effective method for prioritizing
- Set reasonable time frames for daily, weekly and monthly tasks
- Understand the barriers to getting things done
- Manage their work environment
- Inspire their staff to improve themselves
- Set goals through effective planning
- Manage employee interruptions
- Delegate effectively





## Interviewing and Hiring Excellent Claims Professionals

A half-day workshop designed to assist the claims manager in developing effective interviewing techniques to identify the characteristics most desirable in the typically successful claims person.



After participating in team exercises designed to identify the traits they are looking for, each attendee develops effective techniques for either locating, or ruling out, those traits in the person being interviewed.

Lecture, group discussions, role-play and team exercises are all utilized to help the attendee: learn how to recognize certain characteristics in interviewees; learn the right way to test for those characteristics; toss out poor interview techniques; avoid losing control of the interview; avoid being fooled by “perfect” answers; spend the right amount of time in an interview; quickly rule out risky hires (potentially short-timers), and properly set the stage for the salary discussion.

## Managing Change



A half-day workshop designed to help supervisors and managers develop into a motivating influence during times of change. This course provides the skills managers need for understanding the process of change and supporting people through it.

Instruction throughout the course teaches how to rise to the challenge of management changes, office procedure changes, workload changes, etc. and to build a motivated workforce through any situation. Learn the “workplace - grief” reaction to changes, the predictable patterns of the healing process and how to manage the stress of working with anxious employees.



## Motivating Your Claims Team - One Size Fits One

A half-day workshop designed to give some quick tips on motivating claims employees. “One Size Fits One” means I can motivate you only if I understand you, and you can motivate me only if you understand me. Everyone is different. The most important person in motivating me is ME!



Attendees learn what is important and what intrinsically compels an individual to work hard. “One Size Fits One” shows us how to ask the right questions, clamp it shut and use what is learned to drive up performance. They also learn how to create a motivating environment by understanding the generations in the workforce.

## Beating Anxiety and Dealing with Anger



The purpose of this class is offer tips to claims professionals who may be experiencing anxiety when dealing with difficult customers, in addition to reducing the frustration and anger customers may express throughout the claims process.

### Topics include

- Dealing with the angry customer
- Meeting and exceeding customer expectations
- Reducing our own anxiety through improved customer satisfaction
- Dealing with the snide comment
- Learning to not take things personally
- Words to avoid
- Gaining customer cooperation



## Additional Courses offered by International Insurance Institute

Although not featured in this course catalog, the following workshops are also available. If you are interested, an outline is available by contacting Carl Van at 504-393-4570 or [CarlVan@InsuranceInstitute.com](mailto:CarlVan@InsuranceInstitute.com)

### Soft Skill

- Conflict Resolution for the Claims Professional
- Managing the Telephone
- Interpersonal Skills
- Professionalism Tips for Claims
- The Maxims of Customer Retention in Claims
- Agents as our Partners
- Making Initial Contact - Improving the First Impression
- Customer Service for the FNOL Representative
- What You Say Matters

### Technical

- Reservation of Rights Letters
- Auto Policy Coverage Interpretation
- Consistency in Workers' Compensation Evaluations

### Management

- Keys to Effective Presentations
- The New Claims Supervisor
- Teaching Your Adjusters the 8 Characteristics
- Teambuilding Games
- Effective Delegation

All of the above classes, along with all workshops described in this catalog, can be modified to be specific to Underwriting, Operations, Agency, Legal, Subrogation, or any other department.

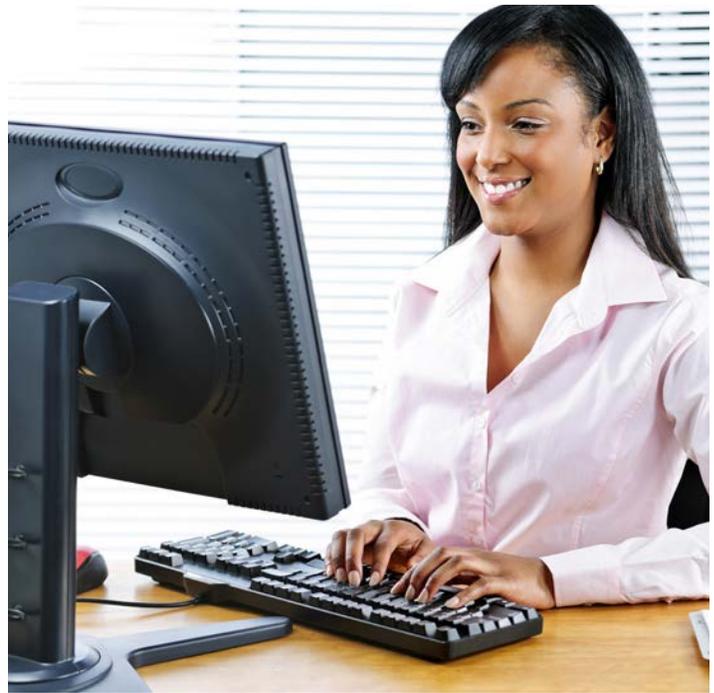


## VIRTUAL TRAINING

We have received many requests for training that can be delivered via webinar. To assist our customers with their training needs, we have launched a webinar-based training program.

Virtually any in-person workshop in our current catalog can be delivered in a condensed webinar format specifically for your company employees. Each webinar would be for your company only, and you would have the option to purchase the recording of the webinar to install on your company LMS for future viewing.

*Popular topics include:*



- ◆ Negotiation Skills for the Claims Professional
- ◆ Awesome Claims Customer Service
- ◆ Real-Life Time Management
- ◆ Business Writing for Claims
- ◆ Dealing with Difficult Customers

To view samples, go to <https://vimeo.com/showcase/7299922>



In addition to specific courses, International Insurance Institute provides guest speaking. From local claims associations, to national conferences, to company meetings and retreats, the Institute delivers engaging and practical presentations that range from breakout sessions to keynote speeches.

Topics for guest speaking are always designed to meet your objectives and are specific to your audience.

### **Claims Soft-Skill**

Customer Service  
Time Management  
Negotiation Skills  
Critical Thinking  
Interpersonal Skills  
Professionalism Tips

### **Claims Management**

Teaching and Coaching  
Motivation  
Leadership  
Employee Development  
Managing Change  
Interviewing Skills



# CLAIMS EDUCATION CONFERENCE

The Claims Education Conference, presented by International Insurance Institute (III), has merged with The SCLA Annual Claims Conference presented by American Educational Institute (AEI) and the Society of Claim Law Associates (SCLA).

## SESSIONS

The training staff at III provides claims skills training, while SCLA experts provide the claims law seminars traditionally presented at the SCLA Conference.



## GROUP ACTIVITIES

Group activities include a trip to the New Orleans School of Cooking, a tour of the Louisiana swamps in an airboat, a French Quarter ghost tour, a plantation mansion tour, a horse carriage ride, a visit to a World War II museum, a riverboat cruise, and many other fun adventures.



## HOTEL INFORMATION



New Orleans is one of the world's most unique destinations and is at your doorstep when staying at the Hilton New Orleans Riverside Hotel. Enjoy over 100 shops in the Riverwalk Marketplace next door or take in the majestic views of the Mississippi River. With streetcar access at the hotel's front entrance and only three blocks to the French Quarter, you will find yourself in the center of the action.

## REGISTRATION

Plan NOW to attend: May 2 - 5, 2023; May 14 - 17, 2024

Full registration includes educational sessions, access to the exhibit hall, networking events with food and drink and extensive tools and tips to take back to the office. Take advantage of our early bird rates!

How to Register: Visit [www.claimseducationconference.net](http://www.claimseducationconference.net) and click on "Register."

If you have any questions, please contact Lisa Ferrier at (612) 868-3650.

# CLAIMS EDUCATION CONFERENCE



## GROUP DINING EXPERIENCE



The recognition and awards chef and restaurateur Emeril Lagasse has garnered, have made him known to food-loving Americans everywhere. His restaurants consistently win critical praise and top ratings.

Emeril's Restaurant is Emeril Lagasse's famed flagship restaurant housed in a renovated pharmacy warehouse in New Orleans' Warehouse District. Since opening in 1990, Emeril's has been a definitive force in contemporary New Orleans cuisine and has earned rave reviews and accolades for nearly 25 years, including Esquire magazine's "Restaurant of the Year" and Wine Spectator's "Grand Award" every year since 2000. Emeril is kind enough to let us use his flagship restaurant for a group dining experience you'll never forget.



Having fun at the Conference

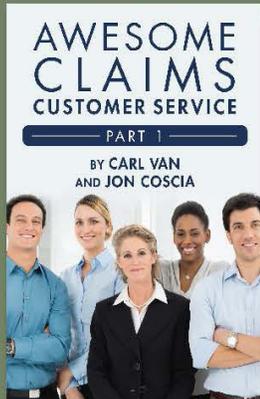


# CLAIMS PROFESSIONAL BOOKS

www.ClaimsProfessionalBooks.com

(A division of International Insurance Institute, Inc.)

International Insurance Institute offers a variety of publications that are sure to be an invaluable addition to any claims professional's tool box.

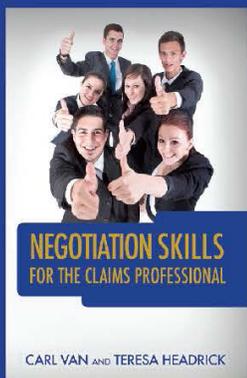


## AWESOME CLAIMS CUSTOMER SERVICE PART 1

This book provides tips, strategies and recommendations for claims professionals to both improve the customer experience while making their jobs easier.

In claims, our customers have had something bad happen to them. They didn't want it, they didn't ask for it, and they don't like it. Sometimes we have to deal with our customers a little bit differently. If after reading this book you can get customers to listen to you better, remember more of what you said, be more patient, be much more reasonable, stop calling as much, trust you more, cooperate much more, and understand you better, would that be a few hours well spent? We think so because that's the outline for *Awesome Claims Customer Service – Part 1*. By reading this book, you will greatly improve customer service, increase retention and make your job much, much easier in the process. So, let's get started!

Written by Carl Van and Jon Coscia.  
(Paperback \$24.95; Kindle \$9.99)

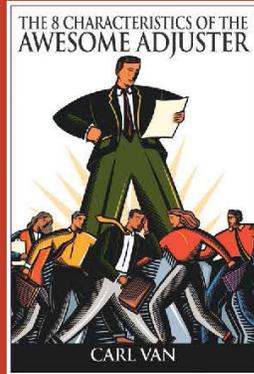


## NEGOTIATION SKILLS FOR THE CLAIMS PROFESSIONAL

This is a straight forward, real-life approach to negotiations from the perspective of the claims professional. Short on complicated theory, and heavy on real-life situations, this book highlights

many simple yet powerful approaches to negotiating with customers and even attorneys.

Written by Carl Van and Teresa Headrick.  
(Paperback \$24.95; Kindle \$9.99)



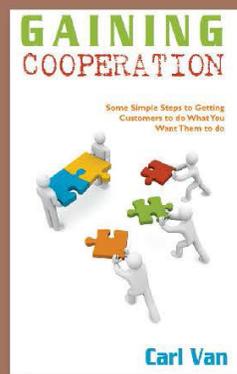
## THE 8 CHARACTERISTICS OF THE AWESOME ADJUSTER

The #1 Selling Claims Book for the past 6 years, selling internationally throughout the United States, Canada, Guam, Singapore, France, Australia, England, Chile, Ireland, and 15 other countries.

Outlines the 8 Characteristics that make truly great claims people, and offers some practical advice on how to improve oneself.

Written by Carl Van.

(Paperback \$29.95; Kindle \$9.99)



## GAINING COOPERATION: Some Simple Steps to Getting Customers to do What You Want Them to.

Gaining Cooperation provides some very simple yet powerful

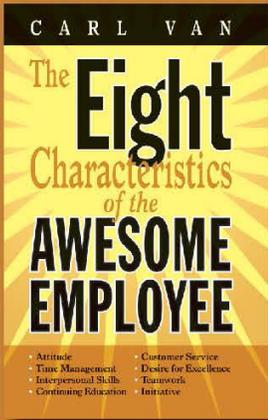
ways to gain cooperation from customers without threats or arguments. Three easy steps are outlined to getting customers to not only cooperate, but to agree it is the right thing to do.

Written by Carl Van.

(Paperback \$19.95; Kindle \$8.99)

BOOKS AVAILABLE FOR PURCHASE AT

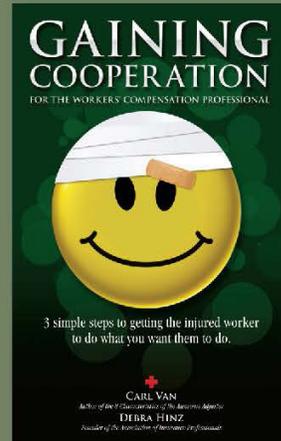
www.InsuranceInstitute.com or www.ClaimsProfessionalBooks.com



## THE EIGHT CHARACTERISTICS OF THE AWESOME EMPLOYEE

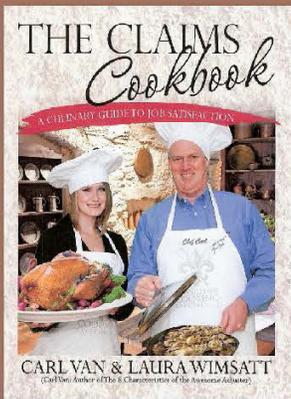
This book is an expanded version of The 8 Characteristics of the Awesome Adjuster. It is

twice as long, includes more examples, and is written for the general public. It applies to employees at all levels. Released by Pelican Publishing Company, 2012. Available at [www.ClaimsProfessionalBooks.com](http://www.ClaimsProfessionalBooks.com) and [www.pelicanpub.com](http://www.pelicanpub.com) (Hardcover \$24.95)



## GAINING COOPERATION FOR WORKERS' COMP PROFESSIONALS: 3 Easy Steps to Getting Injured Workers to do What You Want Them to do

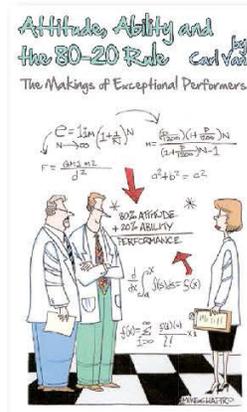
Based on the principles developed in the original Gaining Cooperation, this book is specific to the Workers' Comp industry. All examples are real-life situations faced in the Workers' Comp business. Written by Debra Hinz and Carl Van. (Paperback \$19.95; Kindle \$7.99)



## THE CLAIMS COOKBOOK: A Culinary Guide to Job Satisfaction

Yes, this is a real cookbook, but one with some dishes only claims professionals can appreciate. The

SUBRogationsandwich, Chicken TORTellini, The DUI Daiquiri, Boston "Claim" Chowder, Claimant Crab Cakes, Attorney Red Beans and Lies, Delay Soufflé, So Sue Me Sushi and plenty of others. Written by Laura Wimsatt and Carl Van. (Paperback \$34.95)



## ATTITUDE, ABILITY AND THE 80/20 RULE: The Making of Exceptional Performers

Makes the case that the people's performance is 80% their attitude, and only 20% their actual job ability. Numerous examples illustrate that with the right attitude, anyone can be an exceptional performer. Written by Carl Van. (Paperback \$19.95; Kindle \$7.99)

BOOKS AVAILABLE FOR PURCHASE AT [www.InsuranceInstitute.com](http://www.InsuranceInstitute.com) or [www.ClaimsProfessionalBooks.com](http://www.ClaimsProfessionalBooks.com)



**TRAINING**

**Non-Member**

**Member**

1/2 Day Classes	\$415.00/student	\$330.00/student
Full Day Workshops	\$625.00/student	\$510.00/student

The above prices are based on workshops with a minimum of 15 students and a maximum of 35 students. Please inquire for additional discounts for workshops of 36 students or more.

**VIRTUAL TRAINING Non-Member**

**Member**

Webinars	\$100.00/hour/person	\$75.00/hour/person
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**GUEST SPEAKING**

\$5,000.00 for the first two hours and \$1,500.00 for each additional hour, plus travel expenses. This includes ONLY actual speaking times. No charge for preparation time, travel time or wait time.

**OTHER SERVICES**

**Non-Member**

**Member**

Consulting	\$600.00/hour	\$480.00/hour
Form Letter Writing	\$600.00/hour	\$480.00/hour

All prices above for training and other services do not include expenses incurred if travel by III is required. Expenses paid in advance of service by III are subject to a 15% advance fee (10% member) and are added to the total service charged. No advance fee is applied if a deposit is paid.

For locations in the United States and Canada, the instructors travel coach class. For overseas international, instructors travel business class.

## Membership



Current members of International Insurance Institute, Inc's **Global Education Network**

<b>Member Name</b>	<b>Member Number</b>	<b>Member Name</b>	<b>Member Number</b>
21st Century	510	Auto-Owners Insurance	719
AAA of Michigan	318	AVIVA Canada	638
AAA of Missouri	647	Balboa Insurance	326
AAA of Southern California	600	Berkley SE	750
AAA of Texas	752	Berkshire-Hathaway	633
ACCC Insurance	648	Blue Cross	115
Acceptance Insurance	516	Builders Mutual	120
Accident Fund	753	California Casualty	686
ACE International	718	California Dental Association	295
ACE USA	301	California Insurance Group	228
Acuity Insurance	601	California Insurance Guarantee	692
Aetna	513	California State Automobile Association	88
AF Group	30	Canadian Insurance	721
AFNI Services	622	Carl Warren and Company	107
AIG	514	Celina Insurance Group	665
Alaska Mutual	757	Central Insurance	130
Alberta Motor Association	635	Century Insurance Group	693
Alfa Corporation	716	Chubb Insurance Group	296
All My Sons Moving	50	Church Mutual	135
AllCat Claims Service	661	CIGNA Insurance	292
Alliance United	662	Cincinnati Insurance Company	605
Allianz Global	758	ClaimFox	140
Allied Insurance	515	CNA Insurance	275
Allstate Insurance	25	Colonial Penn	297
Allstate of Canada	688	Colorado Farm Bureau	145
American Family	327	Consumers Insurance	517
American Home Insurance Company	624	Copart	150
American Mining	760	Cotton States Insurance	410
American Modern Insurance	663	County of Santa Clara	639
Ameriprise	604	County Reinsurance	762
AMICA	690	Crum and Forrester	155
AmTrust Group	105	CSE Insurance	250
Anderson Claims Service	541	CUNA Mutual Insurance	667
Arbella Mutual	553	Desjardins General Insurance	713
Arbitration Forums	632	Dollar/Thrifty Auto Group	518
Arizona Self Insurers	755	Electric Insurance	445
Arkansas Farm Bureau	664	Employer Resources Northwest	564
Arrow Claims Management	300	Encompass Insurance	276
Association of Insurance Professionals	560	Erie Insurance	165
Assurant Solutions	557	ESIS Inc	717



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<b>Member Name</b>	<b>Member Number</b>	<b>Member Name</b>	<b>Member Number</b>
Esurance	542	Key Risk	573
Farmers Alliance Mutual Insurance Co.	609	Kingsway Amigo Insurance	683
Farmers Commercial	408	LAMMICO	631
Farmers Mutual of Nebraska	567	Lancer Claims Services	388
Farmers Personal	101	LASIE (Louisiana Association of Self-Insured Employers)	430
Federated Insurance	238	Latitude Subrogation Services	744
Fireman's Fund Insurance	568	Legacy Insurance	475
First Chicago	764	Liberty Mutual Insurance	543
First Insurance Company of Hawaii	805	Louisiana Citizens Property	745
Florida Farm Bureau	610	Louisiana Farm Bureau	576
Foremost Insurance	669	Macro-Pro Inc.	480
Frankenmuth Mutual Insurance Co.	611	Meadowbrook Insurance	672
Germania Insurance	748	Meemic Insurance	447
Glatfelter Insurance Company	612	Mercury Insurance	364
GMAC Insurance	112	Michigan Farm Bureau	427
Golden Eagle Insurance	519	Midland Claims	673
Grange Insurance	1	Millers Mutual Group	773
Gray Insurance	711	Mississippi Farm Bureau	580
Great American	329	Montana State Fund	674
Great West Casualty	215	Mountain West Farm Bureau	675
Guaranty National	191	NAMIC (National Association of Mutual Insurance Companies)	500
Guide One Insurance	571	Nashville Claims Association	582
Hallmark Insurance	280	National Association of Subrogation	449
Hanover	285	National General	550
Harford Mutual	767	National Interstate	562
Harleysville Insurance	437	National Underwriters Company	351
Hartford Insurance	670	Nationwide Insurance	520
Hastings Mutual	288	Next Insurance	775
Hawaii Employers Mutual	698	Nodak Mutual Insurance	676
Heritage Warranty Mutual	671	North Dakota Mutual	655
Horace Mann Insurance	412	Northbridge Insurance	685
IAT Insurance	305	Ohio Casualty Group	399
Indiana Workers' Comp Insurance	724	Olivet College	680
Infinity Insurance	335	One Beacon Insurance	521
Intercare Insurance	772	Oswego County Insurance	735
Island Insurance Company	380	Pacific Gas & Energy Company	614
Jefferson Insurance Company	302	Palisades Safety and Insurance	453
Kansas Farm Bureau	417	Peco Energy	615
Kemper Insurance	298	PEMCO	740
Kentucky Farm Bureau	380		

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<b>Member Name</b>	<b>Member Number</b>	<b>Member Name</b>	<b>Member Number</b>
Philadelphia Insurance	584	Surety and Fidelity	726
Pilot Catastrophe Services	455	Texas Farm Bureau	324
Pinnacle Risk Management	587	Texas Municipal League	790
Pinnacol Assurance	627	Texas Municipal Risk	777
Plymouth Rock Assurance	457	Texas Property	706
Port Authority	770	Texas Windstorm	747
Portage Mutual	780	The Dentist Company Insurance	534
Professional Claims Service	524	The Hartford	291
Progressive Insurance	47	The Wawanesa Mutual Insurance	715
Property Damage Appraisers	634	TIG Insurance	536
Prudential Insurance	294	Tower Hill Insurance Group	350
Puget Sound Energy	640	Transamerica	537
QBE Insurance	695	TransAmerica Life	646
RAS Companies	696	Transpac Solutions	707
RBC General Insurance	415	Travelers	538
RCIS	459	Unifund Insurance	678
Red River Mutual	782	Uniguard Insurance	544
RenRe	643	United Heartland Insurance	679
RLI Transportation	525	United Heritage	779
Rockford Mutual Insurance	677	Unitrin Services Group	709
Royal and SunAlliance	526	Universal Property & Casualty Insurance	792
RSA Insurance Group	660	Universal Underwriters Insurance Co.	617
Sacramento Utility (SMUD)	527	USAA	730
Safe Auto Insurance	616	Utica National Insurance	794
SAFECO	338	Vermont Mutual	712
Safety Insurance Company	630	Vermont School Boards Insurance Trust	796
SECURA	507	Vision Insurance	539
Security First Insurance	786	Washington Schools Risk Mgt.	749
Sedgwick Insurance	700	WAUSAU Insurance	540
Selective Insurance	702	Wayne Insurance	800
Sentry Insurance	705	WCCP Association	441
Sequoia Insurance	529	Westbend Mutual	619
Shelter Insurance	751	Western Reserve Group	802
Southern CA Edison	530	Westfield Group	469
Southern CA Gas	531	York Claim Services	545
Southern Farm Bureau	428	Zurich Commercial	546
St. Paul Fire and Casualty	361	Zurich North America	495
State Compensation Insurance Fund	532		
State Farm Insurance	357		
State of AZ Risk Management	533		



## *New Orleans*



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[www.InsuranceInstitute.com](http://www.InsuranceInstitute.com)

## *Sacramento*



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