

# Breakthrough Learning for Insurance Professionals and Leaders

## **PROGRAM CATALOGUE 2026**



# The CIOP Institute: Transforming the Insurance Industry One Mind at a Time

## Welcome to the New Insurance Industry

**It isn't just another phase or cycle. It is a fundamental shift – a broad and deep fracturing in what was previously deemed as acceptable performance within the Insurance Industry.** The pace of change has accelerated. Past industry leaders are giving way to the nimble, the agile, the quick, the smart, the innovators. To those that can deliver far more with far less. And do so faster. The fundamental forces of change are challenging organizations to reexamine themselves in an unblinking, factual, and forthright manner; to question traditional ways of doing business, purge the organization of waste, renovate existing structures, processes and practices while unlocking the true potential of the enterprise. The resilient organizations that are successfully adapting and rising to this challenge are continually retooling their human capital and talent with far more robust, and powerful, knowledge and skills. For they know despite the forces of change blowing across the insurance industry one constant remains. That success in every and all business matters is dependent, more than ever before, on having the right people thinking about the right things in the right way through the right skills; Advancing the organization through new insights and acting with relentless purpose on these insights.

**The CIOP Institute was formed by a group of insurance executives** and practitioners who recognized the critical need to provide highly relevant and more rigorous learning experiences for the insurance industry. The resulting professional development and insurance designation programs deliver a deep and immediately actionable understanding of critical concepts, tools and techniques through high impact instructor led tutorials.

**Each tutorial presentation is characterized by high engagement, interaction and lively discussion.** The tutorials are intense; combining cutting edge ideas with practical, proven and enduring techniques. The tone is challenging and the content robust – resulting in a highly informative, stimulating, and fast paced development context. Topical content is further brought to life through relevant case studies and extensive “how-to-apply” insurance company examples.

**Pre-existing business assumptions are challenged, and the conferences are charged with the excitement of newly informed discussion, creative debate and continuous participation.** Resulting knowledge and insights are both profound and pragmatic. Participants return to their positions with far greater knowledge, a broader more integrated skill set, and a much deeper toolkit to create innovative solutions, sharply improve productivity, and generate substantially higher levels of organizational performance in an immediate and sustainable manner.

“The greatest enemy of knowledge is not ignorance, it is the illusion of knowledge”

- Stephen Hawking



“Hungry people are always looking for more. More things to do. More to learn. More responsibility to take on....They never have to be pushed by their manager or teammates to work harder and learn more because they are self-motivated and diligent”

- Patrick Lencioni



# No Vendor Showcases, No Pedestrian Ideas, No Superficial Presentations: Just Outstanding and Relevant Content Geared to the Unique Needs of Insurance Leaders and Professionals Delivered Through Four Distinctive Ways

**Open Enrollment Classes & Workshops:** Participants sponsored by insurance carriers attend an intense professional designation class. Topical concepts and respective tools are covered supported by insurance specific case studies. “Work-Out” sessions are woven throughout the conference to provide participants the opportunity to practice and apply newly learned techniques.

Active Adult Learning and Actionable Knowledge That Can Be Applied by Participants to the Immediate Benefit of their Organization

**On-Site Classes & Workshops:** Insurance Companies wishing to put a larger number of their staff through a particular professional development program, than can be accommodated through the centralized class format, arrange to have the CIOP Institute conduct the respective class and workshop for their staff either through on-site or instructor led virtual distant learning

Immediate Companywide Elevation of Knowledge & Skills

**Insurance Industry Symposiums & Workshops:** Thought leaders, authors and practitioners deliver “deep dive” presentations and topical briefings on emerging developments of potential high impact to the insurance industry

Understanding and Proactively Addressing Industry Developments

**Company Specific Training and Upskilling:** Based on the needs of an insurance carrier, topical content is selected from the various professional development programs and adapted to form an integrated and customized class which is conducted for requesting organizations

Professional Development Tailored to Company Specific Requests

## Contact Us – We Are Here for You!

Looking for more information regarding professional development opportunities for yourself, colleagues or for your team?

- Review expanded course descriptions and download brochures that contain additional details regarding specific professional and management leadership development programs by accessing the Institute’s website ([www.ciopinstitute.com](http://www.ciopinstitute.com))

Would you like to explore conducting a professional development program specifically for your organization?

- Please contact Paul James, Dean of Curricula via email ([pjames@ciopdesignation.com](mailto:pjames@ciopdesignation.com)), or call the CIOP Institute (866.930.CIOP)

To register for a scheduled class, have questions or need assistance in anyway;

- Please call the CIOP Institute (866.930.CIOP) or email Sophia Vallen, Program Class Coordinator ([svallen@ciopdesignation.com](mailto:svallen@ciopdesignation.com))



# Lean Six Sigma Black Belt (LSSBB) Designation Program: Mastering and Applying Lean Six Sigma Best Practices to Achieve Breakthrough Performance



Participants earn their Lean Six Sigma Black Belt Certification in a highly effective and efficient manner through a comprehensive learning of all the concepts, tools and techniques that comprise the lean six sigma bodies of knowledge and frameworks

**Overview:** The demand for experienced insurance professionals and leaders who are also recognized for attaining their Lean Six Sigma Black Belt (LSSBB) level of mastery far outstrips the supply of qualified talent. The Lean Six Sigma Black Belt Designation Class; Designing & Building the Lean Insurance Organization is in response to the overwhelming demand for a Lean Six Sigma professional development and certification program that is both rigorous as well as practical in its focus on insurance. Lean Six Sigma frameworks and applications are comprehensively conveyed and brought to life through dynamic and intense presentations and “Practice Work-Outs”. Knowledge and understanding are quickly grasped resulting in a set of insights and a powerful toolkit which attendees can immediately apply to the benefit of their organizations. Instructors are insurance savvy Lean Six Sigma Master Black Belt practitioners who excel at simplifying complex concepts and demonstrating practical applications within an insurance business context. The program syllabus is organized around the following topical domains:

- ✓ Lean Production Fundamentals that Drive Performance Improvement
- ✓ Identifying, Isolating and Purging Waste in all its Forms From Every Dimension of the Organization
- ✓ Lean Six Sigma Design for World Class Service Delivery
- ✓ Accelerating Work Velocity and Process Cycle Time Efficiencies
- ✓ The Essential Lean Operations Metrics & Predictive Analytics; Takt Time to Lead Time to Cycle Time
- ✓ Lean Six Sigma Customer Experience Performance Improvement Design & Deployment
- ✓ Engineering Costs Out of Insurance Products, Processes & Distribution Channels
- ✓ Artificial Intelligence Enabled Root Cause Analysis and Machine Generated Pre-emptive and Corrective Action
- ✓ Using Lean Six Sigma to Create Breakthrough Innovations Including the Rescaling of Staff Resources
- ✓ Value Stream Mapping, Data Collection, Measurement & Lean Statistical Process Control
- ✓ Best Practices & Methodologies in Conducting Both Large Scale & Problem Specific Lean Initiatives, Kaizen and Gemba Walks
- ✓ Generative Agentic AI Enabled Design for Six Sigma Performance and Process Capabilities

More details regarding the Lean Six Sigma Black Belt Class program can be found at [www.ciopinstitute.com](http://www.ciopinstitute.com) or by contacting the CIOP Institute at 866.930.CIOP

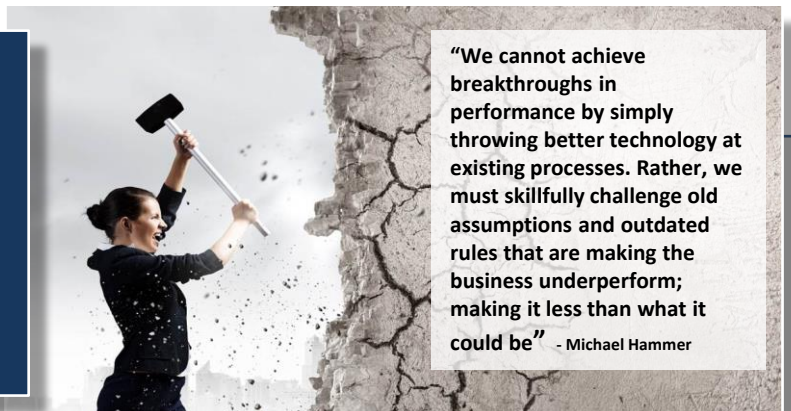
**WHEN: APRIL 22-24, 2026**

**CLASS LOCATION:**

**AMA** American Management Association  
NYC Executive Conference Center  
1601 Broadway at 48<sup>th</sup> Street

**Tuition: \$3,550**

10% Discount for Teams of 3+  
20% Discount for Teams of 5+  
30% Discount for Teams of 7+



“We cannot achieve breakthroughs in performance by simply throwing better technology at existing processes. Rather, we must skillfully challenge old assumptions and outdated rules that are making the business underperform; making it less than what it could be” - Michael Hammer

# Generative Agentic AI Enabled Insurance

## Performance Workshop: Converting the Potential and Power of Generative Agentic Artificial Intelligence into Actual Insurance Applications that Accelerate Profitable Growth, Greatly Elevate and Amplify Human Capacity, Accelerate and Radically Simplify Operational Processes While Enhancing the Customer Experience



"Dig into every industry and you'll find AI changing and indeed transforming the very nature of work. And such innovations are sparked by people who find fresh ways to look at the world"

- Daniela Rus, Director  
MIT AI Laboratory



Through a deep immersion into the foundational principles, frameworks, platforms and insurance applications of artificial intelligence, participants earn their Certified AI Insurance Practitioner (CAIP) designation.

**Overview:** Every insurance professional is aware that Artificial Intelligence holds the potential of transforming how insurance companies come to market, select risks, construct customer solutions, make decisions, work and operate. No technology has so shaped today's business narrative as the almost daily advancements in the extraordinary sophistication of AI. But the real challenge is to rise above the hype. To set aside what we are being told or sold and strive to gain actionable knowledge. The knowledge that harnesses the power of AI to enable ever higher levels of organizational and individual performance. The knowledge to rapidly translate the potential of AI into high impact insurance applications that deliver immediate value.

### The Generative Agentic AI Workshop

delivers a high impact learning experience that equips participants with the insights required to translate the potential of AI into real-world insurance applications. The content rich curriculum replaces theory with practice by integrating three domains of knowledge. Models and applications gained through the Insurance industry sponsored action research are presented by way of approach, design and illustration. The robust learnings gained through this industry research are then further amplified by actual examples from the very best insurance company developed AI applications. This knowledge is then expanded through "how-to" build and apply insurance AI success stories covering marketing, underwriting, operations and claims.

"The businesses and organizations that succeed with AI will be those that rise above the hype and continually strive in making a solid match between their business problems and the ever-expanding capabilities of AI"

Tom Davenport, Coauthor Agentic AI



**The 2026 Generative Agentic AI Workshop is administered through two venues:** calibrated and conducted for specifically requesting insurance carriers and held once as open enrollment in NYC for all insurance carriers

**WHEN:** APRIL 21, 2026

**CLASS LOCATION:**



American Management Association  
NYC Executive Conference Center  
1601 Broadway at 48<sup>th</sup> Street

**Tuition:** \$2,850

20% Discount for Teams of 5+

30% Discount for Teams of 7+

To also explore conducting the **Generative Agentic AI Enabled Insurance Performance Workshop** for your company please contact Paul James the Dean of Curricula at the CIOP Institute ([pjames@ciopdesignation.com](mailto:pjames@ciopdesignation.com)) - or by calling the Institute at 866.930.CIOP

# Chartered Insurance Operations Professional (CIOP) Designation Class: Designing, Building and Leading World Class Insurance Operations



Participants earn their CIOP Designation while mastering and integrating all the dimensions and techniques associated with reducing costs, improving service and achieving sustainable profitable growth

**Overview:** The CIOP Designation Class provides an intense two-and-a-half-day content rich presentation of the key underlying concepts and cutting-edge techniques in designing, building, engaging and sustaining high performance insurance operations. Given the amount of information that is presented, and the respective knowledge to be gained by CIOP candidates, the teaching approach is particularly rigorous, interactive and dynamic. Since its introduction in 2008, the CIOP Designation has emerged as the standard of knowledge and professionalism for all insurance leaders and professionals who are dedicated to improving the performance of their organizations. Deep content includes the following topics:

- Modeling, developing, and deploying a high-performance operations strategy & modeling
- Driving operational excellence through new scorecards, metrics and big data
- Competing on analytics – leveraging operational data in gaining speed and precision
- Insurance operations that consistently deliver an unparalleled customer experience
- Building operations that deliver a sustainable competitive advantage
- Operations that give traction to business strategy, product development, and distribution
- Technology enabled operational excellence: The emerging technologies, constructs, platforms and Generative Agentic AI that will shape insurance operations of the future
- Turbo-charging insurance operations, service delivery and customer engagement centers
- New frontiers on managing change – Building accountability throughout the organization
- New process design techniques to gain operational speed and flexibility, remove processing costs while expanding process capacity
- Operations organizational design Frameworks & diagnostics
- Customer journey mapping & analysis
- Lean operational manufacturing disciplines that cut costs while contributing to profitable premium growth
- Creating, developing, and executing an operational human capital strategy and talent program
- Target operating model & design, business architecture best practices & building outstanding insurance business ecosystems
- Mastering group dynamics and high performing team development techniques
- Demographic diversity trends & transformation; Insurance customer & employee behavioral impacts and operational considerations

More details regarding the CIOP program arrangements and registration can be found at [www.ciopdesignation.com](http://www.ciopdesignation.com) or by contacting the CIOP Institute at 866.930.CIOP

*"In times of change, learners inherit the earth, while the learned find themselves beautifully equipped to deal with a world that no longer exists" - Eric Hoffer*



*"There is always room in your life for thinking bigger, pushing the limits, and imagining the impossible" - Tony Robbins*



**WHEN:** June 3-5, 2026

**CLASS LOCATION:**

**American Management Association  
NYC Executive Conference Center  
1601 Broadway at 48<sup>th</sup> Street**

**Tuition: \$3,550**

**10% Discount for Teams of 3+  
20% Discount for Teams of 5+  
30% Discount for Teams of 7+**

# Chartered Professional Coach and Instructor (CPCI) Designation: Elevating organizational performance and human capacity by developing the whole person to best fit the emerging and demanding requirements of a new age

"We all need people to tell us when we are wrong, to advise us how to do right, and to encourage, support, arouse, challenge and inspire us along the way" - David Brooks



Through training in the CPCI Progressive Based Performance Coaching Framework, participants learn how to provide holistic personalized pathways for people to embrace and embody the character traits that enhance and expand the boundaries of who they are, their behavior, their value, and their relationships in building a coherent balanced life and a rewarding professional career

In striving to be future fit insurance firms must reach well beyond pursuing new technologies and ensure their people are equally prepared to face and indeed master the challenges a bold and more demanding future will present. That the path to a better organizational future is through people constantly striving to amplify their strengths while taking responsibility to forthrightly confront and surmount their weaknesses. People who are multi-dimensional in their skills, adaptable in their approach, creative in their thinking and forever agile in their pursuit of excellence.



The CPCI curriculum is multidimensional in its approach, deeply impactful through its learnings and highly engaging in its delivery. Attendees emerge with the knowledge, techniques and proprietary instruments to help all those whose path they cross to achieve sustainable performance improvement and enriched well being. Additionally, participants learn how to train and instruct others in developing their coaching skills. The CPCI program's deep content is organized around six highly interactive tutorials through which candidates learn how to amplify the capabilities of others: from Nurturing Relationships to Becoming Excellent Team Members: from Building Great Character to Fostering Creative Thinking: from conditioning others to become the Author of Their Own Unfolding Story to learning how to be Constructively Candid with others.

**WHEN: OCTOBER 21-23, 2026**

**CLASS LOCATION:**

**AMA** American Management Association  
NYC Executive Conference Center  
1601 Broadway at 48<sup>th</sup> Street

**Tuition: \$3,750**

**10% Discount for Teams of 3+**

**20% Discount for Teams of 5+**

**30% Discount for Teams of 7+**



"The summit is what drives us. But it is the climb itself what matters" - Conrad Anker

# Master of Insurance Business Analysis (MIBA)

## Professional Designation: Defining, Designing, Verifying and Deploying Outstanding Business Solutions



Participants experience a thorough grounding in all the dimensions, phases, frameworks and techniques to develop and sustain the very best technology enabled solutions - and in so doing earn their Master of Insurance Business Analysis (MIBA) Professional Designation and level of professional recognition. Deep technical content is further enhanced through interpersonal skill building training including influencing without authority, facilitation best practices, data story telling, and communicating for results.

**Overview:** Recognizing the trend to replace traditional system development methodologies with more agile frameworks the business analysis function has emerged less as a job position and far more as a continuous process and core competency required by everyone involved with building insurance technology solutions. MIBA faculty present topics in a highly compelling manner. Underlying concepts are clearly and fully explained with an emphasis on practical tools and techniques. Course content comes to life through highly interactive instruction supported by extensive insurance case studies and examples. The MIBA Designation program delivers a powerful and pragmatic high impact learning experience – an experience that is immensely rewarding for class attendees and their sponsoring firms; an experience that lasts a lifetime. A high-level summary of the MIBA class topics include:

- ✓ **Business Analysis Foundation and Fundamentals:** Survey of all system development methodologies – How and when to adopt the best from each; Project accelerators; From waterfall to extreme programming to the emergence of agile frameworks including SCRUM and scalable agile such as SAFe. The 7 habits of effective business analysis; The business solution lifecycle; Business analysis performance metrics
- ✓ **Enterprise Analysis:** Connecting business strategies with enabling technologies; Solutions scoping & needs identification; Enterprise architectures & models; Enterprise analysis techniques & toolkit; Root cause analysis; Risk analysis and mitigation; Vendor selection & management best practices; Project governance, stakeholder analysis and structuring decision rights; AI and GenAI Fundamentals
- ✓ **Elicitation of Business Requirements:** Requirements types & planning for elicitation; Elicitation tasks, techniques and skill building; Conducting elicitation workshops; Traditional requirements documentation and the emergence of story boarding; Identifying and mapping dependencies and interfaces
- ✓ **Requirements Analysis, Management & Communication:** Organizing, documenting and prioritizing requirements; Business functional and nonfunctional requirements; Verifying and validating requirements; Managing forward and backward requirements traceability; Prototyping techniques & best practices; Controlling scope creep while assuring the very best solution; Data Story Telling & Presentation
- ✓ **Solution Design, Assessment, Documentation & Implementation:** Design techniques and the BA design toolbox; Conducting effective RAD and JAD sessions; Functional decomposition techniques; testing constructs and methodologies – crafting and applying flawless testing; Scrum training and the BA process within Scrum sprints; Agile & Scrum artifacts, ceremonies and roles; Point of implementation readiness
- ✓ **The Essential Interpersonal Skill Set:** How to influence without authority – two frameworks and techniques; Communicating for results; Facilitation best practices; Working effortlessly with all personality types and effectively dealing with difficult behaviors

**When:** September 9-11, 2026

**Venue:** Instructor Led Virtual Distant Learning

**Tuition:** \$3,150

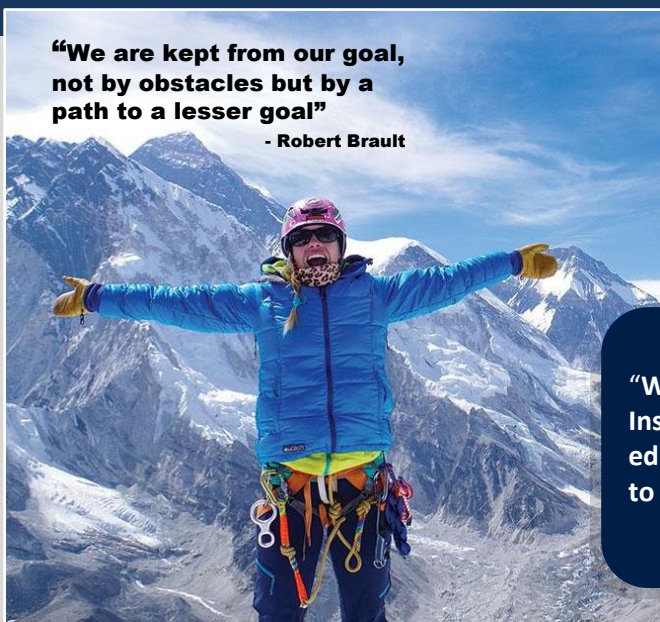
A minimum attendance of 5 participants per sponsoring firm

20% tuition discount for Teams of 10+

**“Information Technology and business are becoming inextricably interwoven. I don’t think you can talk meaningful about one without talking about the other”** - Bill Gates



# Master of Insurance Business Analysis (MIBA) Professional Designation: Defining, Designing, Verifying and Deploying Outstanding Business Solutions



## What MIBA Attendees are saying...

"We appreciate the time the CIOP Institute has taken to create this educational experience. It is second to none."

– Hartford Insurance

"I found the MIBA Designation Program most rewarding; A wealth of learning."  
– Selective Insurance

"Thank you for conducting such a phenomenal class!"  
– Chubb Insurance

"It was a pleasure taking the MIBA Class and I was amazed by the magnitude of the content covered. I look forward to recommending this be offered at a much more extensive level throughout my company based upon my positive experience." – Great American Insurance

"The MIBA class was a great experience, and I am already applying the tools and techniques we covered in class." – USAA

"The MIBA class was THE BEST class I have ever attended during my career in the Insurance Industry."  
– Secura Insurance

"Thank you for such a great class! - Incredibly and immediately beneficial."  
– Nationwide Insurance

"We truly enjoyed the MIBA Designation Class!"  
– AMICA

"I cannot stress how enjoyable and beneficial the MIBA Program has been."  
– Bank of Montreal Insurance

"The MIBA is an excellent class that I will definitely recommend to colleagues." – Allstate

# Strength Based Leader and Coach (SBLC) Designation Program: Revealing, Amplifying and Unlocking the True Potential of Your Organization, People and Yourself

"We can only reach  
the organization's  
greatest potential by  
cultivating the genius  
in everyone"

—Adam Grant

How to enhance, unleash and harness  
individual talent and creativity while  
infusing the organization with  
unrelenting purpose, resiliency  
and a business context that  
continually brings out the  
very best in everyone

**Overview:** The SBLC curriculum emerged from a comprehensive research program that sought to answer two crucial questions. Why is it that some, although far too few, insurance organizations achieve ever higher levels of sustainable profitable real growth? And what must insurance companies do to understand and build the drivers of such performance excellence? Our research revealed four uncompromising practices that leaders of the very best insurance companies are obsessed with: Attaining Self Mastery, Fostering Organizational Health, Building Team Excellence and continually assisting people at every level in Elevating and Fulfilling Their Potential. These four practices serve as the topical domains of performance excellence that constitute the uniquely robust SBLC curriculum

**The SBLC class content** is delivered through dynamic tutorial presentations. Each topic is characterized by high engagement, interaction, lively discussion and continuous participation. Through this dynamic, fast paced, and highly interactive program you will learn how to effectively tap into the latent potential of the people around you, as individuals and as teams, to deliver unprecedented results. Participants gain the knowledge and skills to ignite and inspire everyone they touch to grow far more, to achieve far more and to contribute far more value. This is a deeply impactful learning experience. And its impact is designed to last a lifetime. You will emerge with

the enriched ability to help people to become all they can be to better address immediate organizational challenges while they collectively become more focused on achieving greater things together and bringing their organization into a better future. And in so doing, participants discover who they are, who they aspire to become and the self mastery to reach for, grow and achieve their own full potential

**Elevating  
People Potential**

**Attaining  
Self Mastery**

**Building  
Team  
Excellence**

**Fostering  
Organizational  
Health**

The Strength Based Leader & Coach (SBLC) designation class is conducted for requesting companies thereby enabling a larger number of associates to concurrently improve their ability to interact with all staff associates and build healthy, productive, and enduring business relationships. This creates a certainty of beneficial impact on individuals and team performance across the enterprise. Contact Paul James at the CIOP Institute (866.930.CIOP), [pjames@ciopdesignation.com](mailto:pjames@ciopdesignation.com), to explore conducting this powerful program on your site.

# Customer Experience & Analytics Professional (CXAP) Designation Class: Creating Superior Insurance Customer Experiences Through CX Engineering, Design Thinking and Advanced Customer Analytics

**CXAP**

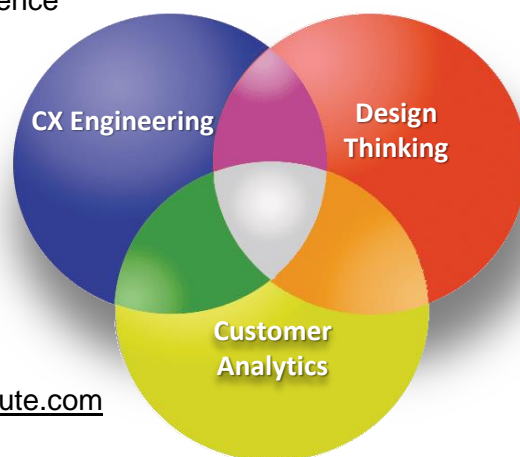
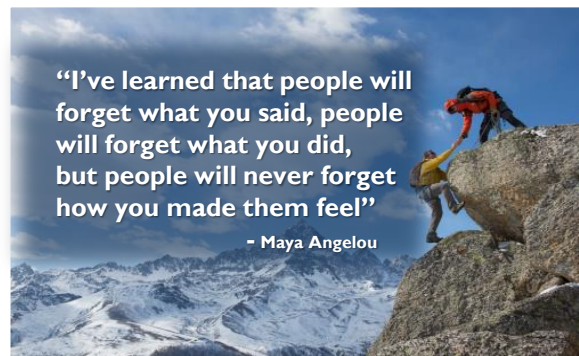
**Customer  
Experience &  
Analytics  
Professional**

Attendees earn their CXAP Designation through an intense immersion in all the frameworks, tools, and techniques for innovating, deploying and continuously improving the insurance customers' experience.

**Overview:** Customer Experience & Analytics Professional (CXAP) program provides a timely, unique and powerful learning opportunity. It is designed to enable insurance leaders and professionals to meet head on the complex challenges associated with the customer experience revolution. CXAP participants discover new ways to innovate, shape and operationalize a truly differentiating customer experience – a customer experience that materially improves business results. Topical content includes:

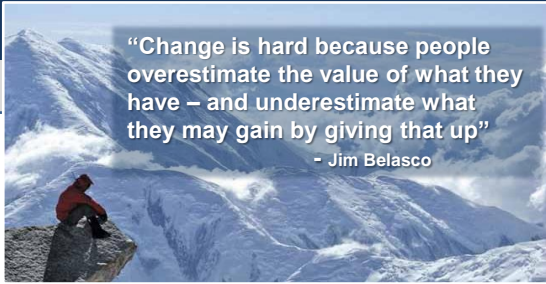
- ✓ Best Practices in Insurance Customer Segmentation, Crafting Customer Personas with Precision, and Enhancing Customer Lifetime Value
- ✓ CX Analytics for Service, Product & Operational Design
- ✓ Capturing, Measuring and Shaping Customer Transaction Behaviors
- ✓ Design, Track and Position the Pre-purchase, Purchase and Post-Purchase CX Journey – Customer Journey Design Mapping Best Practices & Techniques
- ✓ Usability, Findability and Omnichannel CX Design: Overcoming Obstacles to Digital Customer Care
- ✓ CX Centric Process Design & Reengineering
- ✓ Transforming Insurance Operations, Service and Call Centers into Customer Engagement Centers
- ✓ Generational & Demographic Shifts: the Insurance Customer Experience of Today and the Future Based on Societal and Commercial Trends
- ✓ Applying Design Thinking & Frameworks to Leverage the New Dynamics of Customer Loyalty
- ✓ Case Studies in Predictive & Prescriptive Insurance CX Analytics
- ✓ The Digital and Gen AI CX Journey & Customer Engagement Management Technologies – Design, Insurance Use Cases and AI Agents
- ✓ Frontstage & Backstage CX Analysis, Alignment and Augmentation

More details regarding the Customer Experience and Analytics Professional (CXAP) designation program can be found at [www.ciopinstitute.com](http://www.ciopinstitute.com) or by contacting the CIOP Institute at 866.930.CIOP



The Customer Experience & Analytics Professional (CXAP) designation class is conducted for requesting companies thereby enabling a larger number of associates to concurrently improve their ability to interact with all staff associates and build healthy, productive, and enduring business relationships. This creates a certainty of beneficial impact on individuals and team performance across the enterprise. Contact Paul James at the CIOP Institute (866.930.CIOP), [pjames@ciopdesignantion.com](mailto:pjames@ciopdesignantion.com), to explore conducting this powerful program on your site.

# Master of Change Management & Coaching Designation Program (MCMC): Successfully leading, managing and navigating the enterprise, work units and individuals through significant changes and transitions to achieve and sustain higher levels of performance



Participants earn their MCMC Designation through complete learning in all the key frameworks, tools and techniques that collectively constitute change management best practices - while honing their coaching skills to enlist people in change, earning their commitment, improving their resiliency and taking self-ownership regarding their performance and fulfilling their potential

**Overview:** Everything depends on one vital capability. Every project. Every initiative. Every strategy. Every team and work unit. Every individual. So much depends on the ability to change. The willingness to change. The leadership of change. The management of change. Change in all its forms and at all levels. While change management has always been important – the disruptive forces and shifting demographics that are sweeping across the insurance industry has further elevated change mastery as an essential core competency. The Master of Change Management & Coaching (MCMC) program includes a deep dive into all the various change management frameworks, bodies of knowledge, tools and techniques. It combines these deep insights with extensive training in coaching skills and a focus on assisting people through transitions; not only changing behaviors and work practices - but bringing out the very best in people and helping assure their success in the new order of things. It is this unique and powerful combination of the technical content of change management with learning the art and skill of coaching that makes the MCMC program so impactful and of immediate benefit. Participants not only emerge as effective change leaders and coaches they also are transformed by this powerful professional development experience; enabling them to understand people and themselves at a profound level. They emerge as talented agents of change. Topics covered include:

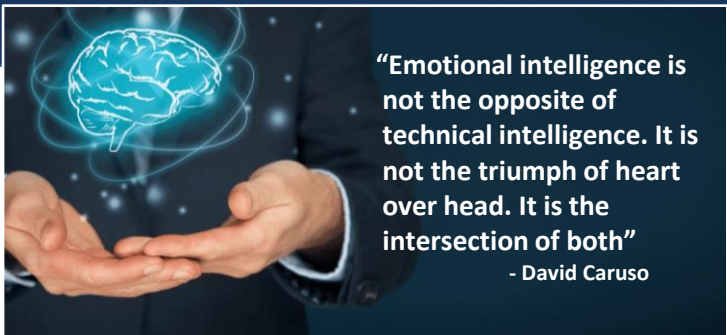
- ✓ Positioning the change program for absolute success: From current state assessment to change journey road mapping
- ✓ How to define change management milestones, celebrating success along the way, gathering change momentum - measuring the change navigational progress
- ✓ Deep dive into all contemporary change management frameworks, models and respective techniques; Forging change integration: The Change Style Indicator (CSI) diagnostic tool and application
- ✓ Crafting and executing the change plan; enterprise, work unit, and individual - driving results at all levels
- ✓ Change management stakeholders; assessment and planning
- ✓ The multi-dimensional change communications program
- ✓ Change coaching essentials and skill building workshop
- ✓ Anticipating, understanding and managing resistance
- ✓ The Change Leadership & Coaching toolkit & templates

**"A coach is someone who gets you to do what you don't want to do so that you can be who you want to be"** - Tom Landry



The Master of Change Management & Coaching (MCMC) designation class is conducted for requesting companies thereby enabling a larger number of associates to concurrently improve their ability to interact with all staff associates and build healthy, productive, and enduring business relationships. This creates a certainty of beneficial impact on individuals and team performance across the enterprise. Contact Paul James at the CIOP Institute (866.930.CIOP), [pjames@ciopdesignantion.com](mailto:pjames@ciopdesignantion.com), to explore conducting this powerful program on your site.

# Emotional Intelligence for Insurance Professionals and Leaders: Understanding and Mastering Emotional Intelligence Competencies to Deepen Your Ability to Become Even More Effective in Helping Others and Your Organization Attain and Sustain High Performance

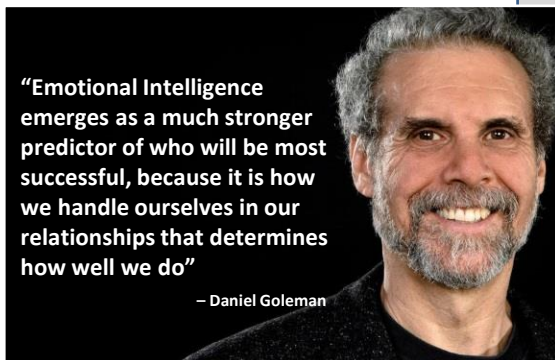


**"Emotional intelligence is not the opposite of technical intelligence. It is not the triumph of heart over head. It is the intersection of both"**  
- David Caruso

Participants learn how to recognize and channel their emotions while proactively considering other people's feelings – and thereby greatly improve their ability to interact with all staff associates and build healthy, productive and enduring business relationships

**Overview:** Regardless of role or rank, emotional intelligence has become a crucial core competency that distinguishes highly effective people. Intellectual and technical expertise will always fall short if emotional intelligence is lacking. This dynamic program thoroughly immerses participants in the four domains of emotional intelligence: Self-Awareness, Self-Management, Social Awareness, and Relationship Management. The class content, tools and techniques and self assessment instruments are specifically designed to elevate professional and leadership capabilities for rapid and significant improvement in individual and team performance. Videos, role plays, and insurance case studies collectively contribute to a very engaging, interactive and high impact professional development experience. An impact that is designed to last a lifetime. Recognizing that most insurance professionals and leaders have mastered the technical intelligence of their positions – emotional intelligence becomes their next need-to-have skill. Topics covered in this program include:

- ✓ Fully understanding Emotional intelligence (EI) and its impact on professional and leadership effectiveness
- ✓ Deep dive into the four domains of the emotional intelligence framework; Self-Awareness, Self-Management, Social Awareness & Relationship Management
- ✓ Measuring, correctly interpreting and improving your current emotional intelligence quotient
- ✓ Exercising emotional self control and regulating your behavioral response to ensure positive impact on those around us and our work
- ✓ Perceiving yourself accurately and techniques to significantly improve emotional intelligence in yourself and in others
- ✓ How to build the emotionally intelligent work team
- ✓ How to apply EI to help you become an outstanding communicator and change facilitator
- ✓ Learning how to listen more deeply while sharpening your mindfulness of context, and people's feelings, hopes, and challenges
- ✓ Combining & integrating EI to with the organization's business initiatives to achieve enduring success



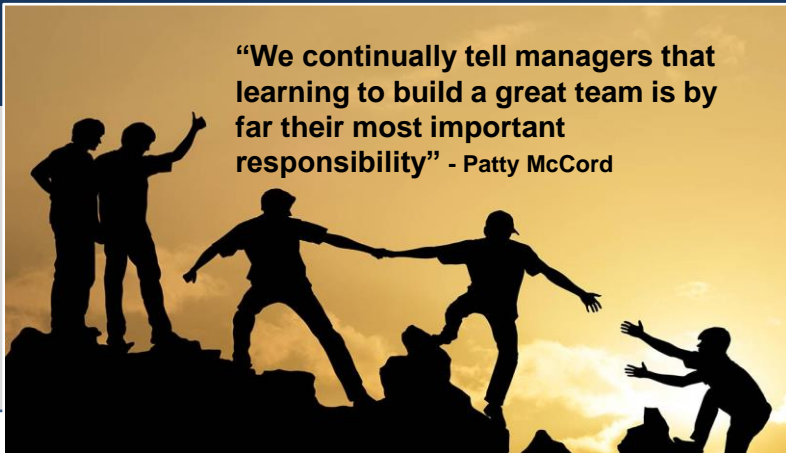
**"Emotional Intelligence emerges as a much stronger predictor of who will be most successful, because it is how we handle ourselves in our relationships that determines how well we do"**

- Daniel Goleman

The Emotional Intelligence for Leaders and Professionals class is conducted for requesting companies thereby enabling a larger number of associates to concurrently improve their ability to interact with all staff associates and build healthy, productive, and enduring business relationships. This creates a certainty of beneficial impact on individuals and team performance across the enterprise. Contact Paul James at the CIOP Institute (866.930.CIOP), [pjames@ciopdesignaction.com](mailto:pjames@ciopdesignaction.com), to explore conducting this powerful program on your site.

# Certified Team Builder and Coach (CTBC)

## Designation Program: Designing, Developing and Sustaining High Performing Teams

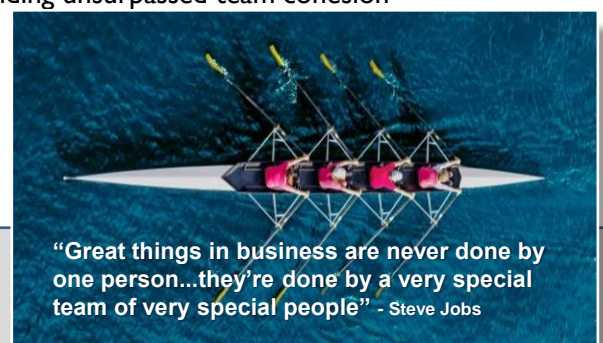


A highly immersive professional and leadership development program that uniquely equips participants with the deep knowledge and acumen to transform all groups regardless of potential into high performing teams: Teams with the emotional intelligence, energy, inspiration, passion and relentless will to go beyond the expected and consistently deliver superior results

**Overview:** In these times of disruption, innovation and speed that are reshaping the insurance industry the unfolding path to success is to masterfully develop high performing teams and provide them the insights, resources and freedom to accomplish great things. Just calling a group a team does not make it a team. Likewise, simply calling a team high performing does not make it a true high performing team. There are fundamental ingredients that need to be fully understood and systematically engaged to transform groups into high performing teams. There are new and specific teamwork processes, disciplines, knowledge and skills that the collective team membership must learn and consistently apply. There are also those critical team social processes to ensure effective team communication, decision making, conflict resolution, continuous feedback, and emotional intelligence that must be learned - as well as the powerful forces of cohesion that must be developed and infused throughout the team. But transitioning to high performing teams, in view of all its promises and opportunities to gain dramatic improvements, presents significant challenges to insurance leaders and professionals. The CTBC program provides participants the knowledge and skills to successfully meet this challenge. Topics and techniques that comprise the CTBC curriculum include:

- ✓ Rigorous understanding of the major high performing team building frameworks, tools and techniques
- ✓ The Team Emotional Intelligence (TEI) framework and how to apply TEI at the individual and team level
- ✓ Coaching development of new teams, project teams, cross functional teams, remote teams, and virtual teams
- ✓ Creating a high performing team progression blueprint: jump starting team development through team accelerators
- ✓ Building team trust, improving team meetings, enhancing group problem solving, decision making and diversity
- ✓ A survey of the very best Team building instruments and how to masterfully apply them as a team coach
- ✓ Training in the seven habits of high performing teams and the respective seven coaching protocols
- ✓ Coaching for team renewal: How to revive, reenergize and reinvigorate longer standing teams
- ✓ Anticipating, avoiding and addressing team dysfunctions; How to define and apply team course corrections
- ✓ Coaching tools to ignite team creativity and innovation while building unsurpassed team cohesion

The Certified Team Builder and Coach (CTBC) designation class is conducted for requesting organizations – thereby enabling a larger number of associates to concurrently improve their ability to interact with all staff associates in building and elevating team performance. This creates a certainty of beneficial impact on individuals and team performance across the enterprise. Contact Paul James at the CIOP Institute (866.930.CIOP) to explore conducting this powerful program on your site.



# Artificial Intelligence, Machine Learning and the Future of Insurance Knowledge Work:

## Closing the Gap between theory and actual practice in understanding and applying the transformative power of Artificial Intelligence

**Overview:** Of all the forces of change and disruption sweeping across the insurance industry it is rapidly becoming clear that artificial intelligence (AI) will increasingly exert a profound and enduring effect. When measured against its potential, the adoption, mastery and application of AI in the insurance industry is at a very early and challenging stage. Key to meeting this challenge and leveraging the power of AI is the need throughout the insurance business community to better understand AI; to understand how programs can learn from data and how this deep continuous machine learning can generate robust insights, better decisions and more precise actions. Attendees gain a working understanding of the fundamental components of artificial intelligence, how these elements are designed, built and integrated -- and the resulting way cognitive computing is transforming traditional insurance core processes, functions and all aspects of knowledge work. Participants learn the essentials and applications of AI, machine learning and Generative AI including:

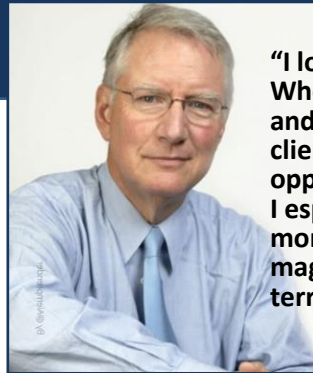
- ✓ Structured Data, Unstructured Data and Algorithms that Identify Hidden Patterns, Respective Insights and How Machines Communicate Prescribed Actions on These Insights
- ✓ Simplifying the Complex: Scorecards, Decision Trees, Neural Networks, Shallow and Deep Learning, Classification Modeling Through Probability Scoring, Regression Modeling Through Magnitude Scoring
- ✓ From Programming Computers to do Tasks to Training Computers to Think and Learn
- ✓ Probabilistic Machine Models, Statistical Learning, Reinforcement Learning, Natural Language Processing and Gaining New Competitive Advantage Through AI
- ✓ AI Enabled Marketing, Product Management, and Distribution: Customer Propensity Models, New AI Enabled Chatbot Best Practices, AI Targeted Segment Analytics & Precision Customer Capture and Interaction
- ✓ The New AI Based Autonomous Operational Model; Digital Intelligent Flow, Self Service and the Rescaling of Staff Resources; Accelerating the design and development of AI agents within insurance operations
- ✓ AI as Assistive Technology: Ensuring Knowledge Workers and Machines Leverage Each Other's Strengths and Attributes and Mitigate Their Inherent Weaknesses
- ✓ AI Agent Communication, Perceiving and Acting, and Robotic Fundamentals; How the Internet of Things Changes the Underwriting of Things
- ✓ Fundamentals of how Generative AI and Large Language Models are created, leveraged and applied within an insurance business context; The DeepSeek accelerated machine learning reinforcement model
- ✓ A Blinding Glimpse of the Future: Claims Adjudication, Underwriting, and Customer Service in the Age of AI
- ✓ Organizing for AI Success: Centers of AI Excellence, AI Facilitated Innovation (AIFI), Data Science and the Essentials of AI Leadership, the AI Project Office, Advancing AI Maturity Through AI Road Mapping
- ✓ Generative AI Insurance Use Cases, Architectural Design and Insurance Case Studies

The Artificial Intelligence, Machine Learning and the Future of Insurance Knowledge Work class is conducted for requesting companies - thereby enabling an insurance organization to realize the benefits of having a larger number of participants concurrently gain respective knowledge and skills. To explore conducting the AI, Machine Learning & the Future of Insurance Knowledge Work on your site please contact Paul James, Dean of Curricula at the CIOP Institute: [pjames@ciopdesignation.com](mailto:pjames@ciopdesignation.com) or by calling the CIOP Institute at 866.930.CIOP

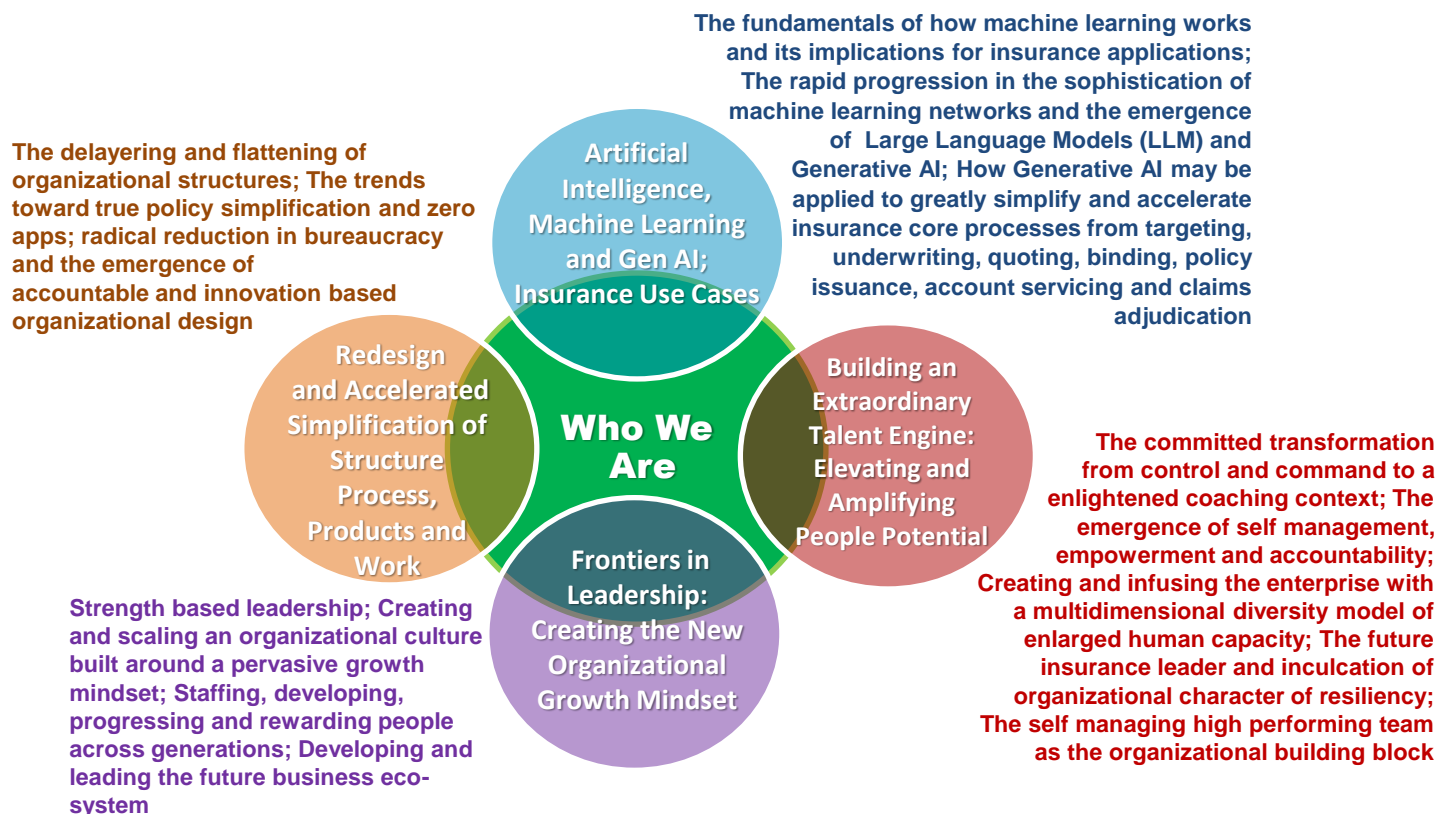


# Megatrends in Insurance: Gaining the actionable knowledge required to fully recognize, understand, and harness the powerful forces of change that are transforming the very fabric of business, the insurance industry and the society it serves

**Overview :** This is a time of discontinuity. A time of extraordinary challenges and disruption. But for the agile insurance organizations. For the tenacious insurance leaders. For those with enduring grit. This time of discontinuity, extraordinary challenges and disruption provides a unique opportunity to excel. To change the prevailing order of things. An opportunity to distinguish and abandon those practices that serve the past but not the future. An opportunity to reimagine what it will take to succeed and thrive in an emerging new reality. The overarching goal of the Megatrends in Insurance workshop is to provide participants with an expansive understanding of the trends that are shaping this new reality and the ability to harness these trends. To bend these megatrends in a way that pushes the organization forward to a better place in a different future. The Megatrends in Insurance takes the form of a highly interactive workshop that serves as a platform for not only learning but for participants to discuss ramifications and possibilities for their firm. The program's curriculum is organized around four tightly interrelated topical domains:



**"I love business at its best. When it aims to foster growth and deliver exciting services to clients and exciting opportunities to its employees. I especially love business at this moment of flux. This truly magical, albeit in many ways terrifying, moment" – Tom Peters**



The Megatrends in Insurance program is conducted for requesting companies - thereby enabling an insurance organization to realize the benefits of having a number of participants concurrently gain respective knowledge and insights. To explore conducting the Megatrends in Insurance workshop on your site please contact Paul James, Dean of Curricula at the CIOP Institute: [pjames@ciopdesignation.com](mailto:pjames@ciopdesignation.com) or by calling the CIOP Institute at 866.930.CIOP

# Certificate of Insurance Management Excellence (CIME) Designation Program:

**Elevating and amplifying the Knowledge and Skills to Effectively Lead and Manage to the Higher Standards of a Rapidly Transforming Insurance Industry**

**“Don’t be in the business of playing it safe. Be in the business of creating possibilities for greatness” - Bob Iger**

A uniquely rewarding and powerful leadership development experience designed for insurance executives, emerging leaders, managers and high potential key professionals who are determined to take their organization, their associates, and themselves to a substantially higher level of performance and enduring future ready capability

**Overview:** The Certificate of Insurance Management Excellence (CIME) is an academically rigorous development experience that provides actionable knowledge of advanced contemporary management and leadership concepts and techniques. The CIME program combines and integrates this knowledge with an expansive understanding of how to adopt and apply the attributes, characteristics, behaviors, and habits that distinguish the very best leaders. The curriculum is organized around six topical domains of knowledge that convey a deep understanding of how organizations function at their very best, how strategic choices are made in relation to market and industry dynamics and how leaders renew themselves while raising and amplifying the talent, potential and performance of people.

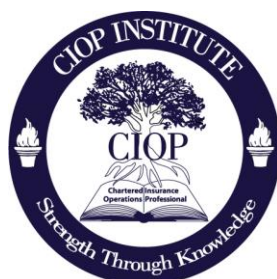
**A Content Rich Curriculum** That equips participants with both the knowledge that are the six building blocks of successful leadership as well as the acumen to think more holistically. To see patterns quickly and accurately, make powerful connections, and develop systematic solutions to increasingly complex problems. All while developing the foresight and honing a managerial growth mindset to anticipate opportunities and successfully stage meaningful innovations.



The Certificate of Insurance Management Excellence (CIME) designation class is conducted for requesting insurance carriers – thereby enabling sponsoring organizations to realize the benefits of having a broader number of management leaders collectively gain respective knowledge and skills – while working collaboratively in experiencing the CIME learning experience. To explore conducting the CIME program for your organization please contact Paul James, Dean of Curricula at the CIOP Institute: [pjames@ciopdesignation.com](mailto:pjames@ciopdesignation.com) or by calling the CIOP Institute at 866.930.CIOP

**The CIOP Institute**  
**2051 Craigmore Dr. – Suite 700**  
**Charlotte, NC 28226**

**FIRST CLASS**



**CIOP Institute**  
**866.930.CIOP**  
**[www.CIOPInstitute.com](http://www.CIOPInstitute.com)**