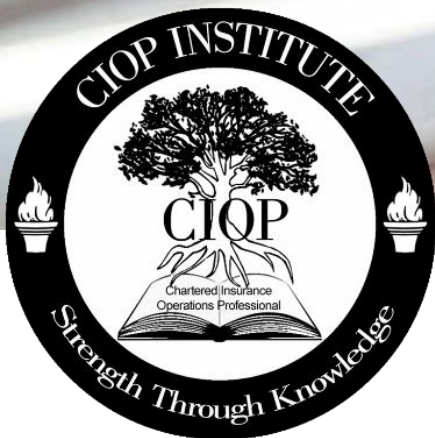


# INSURANCE INNOVATION & PLANNING WORKSHOP

**The Disciplines, Techniques and  
Tools to Achieve High Performance  
Innovation to Enable Your Firm to  
be the  
Future Ready**

**Conducted, Onsite or  
Virtual, For Requesting  
Insurance Companies**



**An Extraordinary Professional Development Program for Extraordinary  
Times: Immediately Actionable Insights to Ignite Meaningful Innovations,  
Shape and Implement Value Adding Change, and Build a Sustainable Culture  
of Creative Problem Solving and Optimistic Energy**



**A Robust, Content Rich, and Highly Interactive Workshop That Provides the Absolutely Essential Knowledge...**

Knowledge... that enables insurance organizations to craft and masterfully execute a superior innovation strategy... To establish innovation as a daily habit of elevating performance... To design and produce new offerings and services distinctively superior to the competition... To consistently create a truly compelling insurance customer experience... To invent and deliver value in ways that no one can easily match... And more than anything else, the knowledge to empower and incent people, regardless of position, to contribute ideas, to think more imaginatively, solve problems on their own and work in profoundly different and better ways.

---

**92% of Insurance CEO's view innovation as both a challenge and essential core competency to drive organizational success in the emerging future insurance industry, operate effectively within a rapidly transforming business environment, and achieve profitable growth in an increasingly diverse, more demanding, and complex insurance marketplace**

---

Innovating to adapt, excel and thrive in times of accelerating and multi-dimensional change requires a new kind of knowledge and the skills to apply this knowledge with certainty of beneficial impact:

**Breaking Down the Barriers to Innovation and Creativity**

**Innovation Essentials, Frameworks, and Methodologies**

**Organizing and Empowering for High Performance Innovation**

**Leading in Times of Industry Disruption and Transformation**

**Insurance Customer Experience Focused Innovation**

**Digitally & Analytically Enabled Innovations and Transformation**

---



**The Insurance Innovation and Planning Workshop agenda is a Robust Combination of Talent Density Building Presentations, Deep-Dive Topical Tutorials, and Insightful Insurance Industry Case Studies - Designed to Help Participants Truly Understand and Harness the Forces of Change that are Reshaping the Insurance Industry While Instilling a Creative Corporate Mindset and Developing an Effective Innovation Strategy for Your Organization**

The Insurance Innovation & Planning Workshop is unique in its design and impact. Instructor facilitated tutorials provide the actionable knowledge that comprise emerging best innovation practices. Participants throughout the Workshop collaborate in applying this new knowledge to their own company situation – resulting in a robust set of ideas and deep insights as to their own innovation possibilities



No vendors. No superficial lectures. No generic speakers. No pedestrian ideas. Each topic is presented in a deeply impactful and thorough manner. Actionable knowledge combined with new ways of thinking, leading and managing is conveyed in a highly engaging manner. Underlying concepts, frameworks and techniques come alive through actual insurance case studies. The tutorials are intensely informative, interactive and compelling – capturing the attention and igniting the imagination of attendees. The entire Workshop is charged with lively discussion and exciting content that moves organizational mindsets from focusing on what is to focusing on what is possible. Attendees leave the Insurance Innovation & Planning Workshop energized, knowledgeable, informed and equipped with a uniquely powerful innovation toolkit – heightened with a robust “Follow-Thru” set of actions specific and calibrated to their own organizational innovation needs, challenges, intentions and opportunities

“You must create a setting, a context, an organization where people are willing and able to do the hard work that innovation requires.”

- Linda A. Hill





# Organizing For High Performance Innovation

Insurance firms are predominately organized around principles dating back to the industrial era. These principles emphasize the need for control, compliance and predictability through structured hierarchies. But innovation, based on its very definition, cannot be attained through such traditional organizational structures. Indeed, the emerging new insurance industry is more and more rewarding those that, through dogged experimentation, creative thinking and dauntless courage, not only generate compelling ideas but turn these ideas into new and exceptional value to customers. To attain this level of transformative innovation requires a different way of organizing. High performance innovation requires organizational patterns and techniques that unleash the imagination of people by removing the barriers that unintentionally inhibit speed, candor and nimble collaboration. Innovation requires that we inspire people to challenge the status quo even if doing so makes us uncomfortable.

**Designing, Organizing and Engaging an Innovation Braintrust**

**Insurance Innovation Lab Best Practices, Accelerators, Incubators and Employee Ideation Hackathons**

**Creating a High Performing Insurance Innovation Center of Excellence**

**Staffing and Deploying the High Caliber Insurance Innovation Team**

**Innovation Funneling; How to Identify and Assess Trends and Opportunities**

**Chief Innovation Officer: Role, Responsibilities, Accountabilities, Desired Characteristics and Behavior**

**Developing and Optimizing a Network of Innovation Partners**

**Establishing a Greenfield Venture: Building a New Separate Business Model**

**Crafting an Iterative Business Innovation Strategy and Flexible Funding Budget**

**Evaluating Ideas and Prototypes: Selecting the Right Innovation Lighthouse Projects**

Achieving high performing innovation is not just about turning existing patterns upside down. It is also about striking a dynamic balance between the old and the new. Being quick to successfully prototype an innovation is one challenge. But a greater challenge often lies with transplanting the innovation into existing processes in a way that avoids rejection or becoming stuck in a bureaucratic quagmire. This tutorial examines all the new alternative frameworks and approaches to organizing for high performance innovation – Organizing people and resources to ensure not only the generation of potentially high ROI innovations but that such innovations are masterfully scaled, adopted and implemented across the enterprise.



# Leading in Times of Industry Disruption and Transformation

Truly effective innovation requires a catalyst. Over and over, again and again, we discover this catalyst is not dependent on just one factor. It is not just technology. It is not just product or process. Effective innovation requires a highly creative integrated approach. The catalyst to forging such meaningful and transformative integration has been and always will be leadership. Leadership that inspires the essential changes that will bring the organization into a better future. Even when such changes challenge long held traditions and current ways of coming to market and operating ...

...for the insightful insurance leaders know that their organizations cannot operate as they have in the past. They embrace what made a company successful historically may no longer be possible as a new normal begins to unfold across the insurance industry and the rapidly changing society it serves. They understand that this new normal is just the next in a series of waves of disruptive forces and developments. And that each wave creates significant opportunities. What distinguishes the better led insurance organizations is their ability to not only see these opportunities but to seize them.

## Preparing the Organization for Transformation

Disruption is not an insurance industry event it is an enduring business reality. But many insurance organizations do not understand how to establish the conditions for achieving organizational transformation and innovation.

## Crafting a Creative and Agile Corporate Mindset

How to change the organizational context; enabling people to feel free to openly share ideas, opinions and criticism. Mistakes are viewed as the inevitable consequence of doing something brand new. Rewarding those who through their boundless optimistic energy lift the aspirations of all during times of ambiguity.

## What Does it Mean to Lead Innovation and Transformation

When it comes to innovation and transformation, job titles and hierarchies should be made meaningless. Leaders must loosen the controls and bureaucracy that unintentionally stifle innovation.

## Removing the Barriers To Innovation

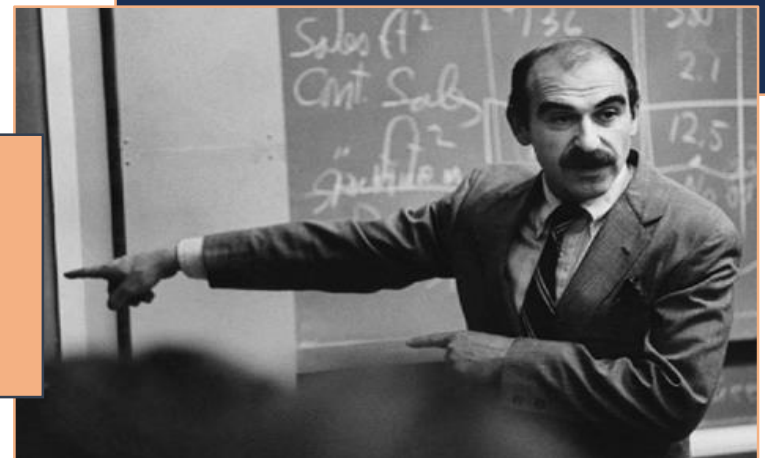
With a traditional emphasis on control and agreeing, and without meaning to, insurance organizations often stifle creativity and the ability to challenge the status quo. A criteria for innovation success is to openly discuss, identify and address these organizational habits that serve as barriers to creativity.

## Creating a Culture of Innovation

Innovation isn't the job of the few; it is the responsibility of the many. Today's quickly changing world demands that all of us improve our knowledge and ability to innovate and that leaders create an organizational culture and operating context that nurtures ever higher levels of creativity – a context that steadily and tenaciously moves all staff members and the firm's entire business ecosystem toward a larger mutually held goal of what can be possible.

**Creativity is thinking up new things. Innovation is doing new things.**

– Ted Levitt



# Innovation Essentials, Frameworks, and Methodologies



The enduring ability to create and deliver meaningful innovations that generate ever higher levels of customer value is a core competency that all insurance organizations, regardless of their size, need to strengthen. Gaining innovation proficiency requires making innovation an essential component of the firm's profitable growth strategy and future ready roadmap. It requires that we re-orient our thinking; That we set about discerning the difference between vision and illusion; between confidence and arrogance; between what encourages true creativity and what impedes it. It requires being alert to shifting dynamics and the nimble agility to adapt accordingly...

... But more than anything else, innovation requires not only knowing what to innovate but how to innovate. Innovation is not fortuitous. It is not an accident. It is not a Plan-B. It is a discipline. A discipline that is rooted in certain methodologies and emerging best practices. This Workshop tutorial provides actionable understanding of the innovation frameworks and imbedded methodologies that are separating the innovation leaders from the laggards. The progressive steps and phases from discovering and greenlighting new ideas, through evidenced based prototyping and testing, to masterful mobilization and deployment are examined – along with illustrative how-to case studies.

**Innovation Readiness: The Innovation Scorecard and Progress Check-Up**

**Understanding, Comparing and Contrasting Innovation Methodologies**

**Balancing External Market Focused vs. Internal Focused Innovation & Transformation**

**Targeted Innovations: Product, Process, People, and Core Customer Insurance Functions**

**Designing and Enacting the Lean Innovation Decision-Making Process; Innovation Road Mapping**

**Leadership Inspired Innovation & Transformation: The Eight Essentials**

**Techniques to Create, Select and Scale Innovations to Make a High Probability Strategic Difference**

**Idea Selection Formulae: Testing to Identify and Validate the Most Financially Promising Innovations**

**How To Design, Integrate and Balance Incremental Innovation with Break Through Innovation**

**Creating a Portfolio of Innovations to Catalyzed Profitable Growth Beyond Current Practices**



# Enabling and Encouraging Innovation Throughout the Organization

New ideas can and should come from anywhere and anyone. Indeed, innovation and creativity are not the responsibility of a select few or limited to leaders. Innovation is the responsibility of all. To tap into the full brainpower and creative potential of its people, insurance organizations often need to establish a different operating context. A context where ideas are expected, nourished and flourish. A creative context that encourages the behaviors that spark and advance ideas and innovations as a natural aspect of everyone's job – regardless of position. We mistakenly think of innovation as a radical breakthrough. But a far more constructive interpretation of innovation is doing anything different that adds value. This broader perspective fosters an overarching management principle that sparks a creativity continuum; from daily continuous improvement in current practices to the more transformative strategic initiatives.

**Incremental Continuous Improvement to Transformative Change – The Integrated Innovation Model**

**Understanding, Coaching and Training the New Creative Growth and Beginner's Mindset**

**Creating Candor as an Organizational Value: from Concept to Practice**

**Protecting the Future Not the Past: How to Eliminate Fear of Challenging "Business as Usual"**

**Making Employees Energetic Customer Focused Entrepreneurs; Knowledge Based Empowerment**

**Pruning to Stimulate New Healthy Growth: Ideation to Eliminate Waste and Outdated Practices**

**Encouraging and Equipping Employees to Test, Validate and Sponsor New Ideas**

**Creating an Innovation Incentive System: Fostering, Motivating and Rewarding Team Innovation and Creativity**

**Idea Generating Teachable Techniques: Collision Sessions, Other Industry What-If's, Shark-Tank Team Innovation Pitch, Hamburgers from Sacred Cows; Boundary Relaxation**

**Understanding and Eliminating Innovation Killing Organizational Practices, People, and Processes**

This Workshop tutorial is a deep dive into the underlying concepts and actual techniques that inspire and empower creativity in everyone. Attendees not only gain knowledge into the underlying theories of fostering creativity – but are provided an actionable tool kit of techniques and approaches by which people imagine better ways of operating and forge these ideas into reality.



### **Who Should Attend:**

Regardless of function or position, innovation and thinking creatively to discover new possibilities, better solutions and more value is everyone's responsibility...and everyone's challenge. The Insurance Innovation and Planning Workshop is for all insurance professionals and leaders who are striving to ensure that their organizations meet this challenge and establish innovation as a core competency throughout the enterprise.

### **Virtual Distant Learning:**

Depending on your Company's Preference the Insurance Innovation Planning and Workshop can be conducted via the CIOP Institute's interactive Virtual Learning Platform. Participants are provided easy to follow instructions and links to the CIOP Institute's secure Virtual Distant Learning Platform along with immediate real time access to our staff and host for any assistance in preparing for, and throughout, the Workshop.

### **Schedule and Venue:**

Advanced planning is particularly important in preparing for and conducting the Insurance Innovation and Planning Workshop. Contacting the CIOP Institute to begin discussing the possibility of holding the Workshop for your organization at your earliest convenience is recommended – keeping in mind that the Workshop can be held on your company site or through the CIOP Institute's Virtual Distant Learning platform whichever venue you prefer.

### **Elevate Your Professional Development:**

Gain powerful knowledge and insights to drive innovation. Capitalize on the forces of change and disruption sweeping across the insurance industry. Make a profoundly beneficial impact on your organization.

## **CONDUCTING THE INSURANCE INNOVATION AND PLANNING WORKSHOP FOR YOUR ORGANIZATION**

**A Three Step Process**



**Begin to Explore Conducting the Insurance Innovation & Planning Workshop for Your Company By Contacting Paul James, Dean of Curricula at the CIOP Institute:**

 **Phone: 866.930.CIOP**

 **Email: [pjames@CIOPDesignation.com](mailto:pjames@CIOPDesignation.com)**



**The CIOP Institute Gains Insights as to Your Organization's Specific Needs and Collaborates With You in Crafting a Corresponding Approach and Details Including Scheduling. Tuition Arrangements are Made to Comfortably Fit Your Budget Situation.**



**Workshop Preparations are Completed, and the Program is Conducted for Your Company Either On Your Company Site or Through the CIOP Institute's Virtual Distant Learning Platform As You May Prefer. Resulting Workshop Follow-Through Actions and Discussion Points are Drafted and Forwarded to You by the Workshop's Coordinating Instructor**

**Chartered Insurance Operations Professional Institute**

**[www.ciopinstitute.com](http://www.ciopinstitute.com)**

**866.930.CIOP**