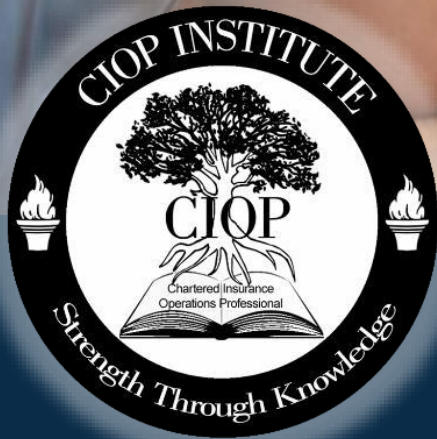




## **CERTIFICATE OF INSURANCE MANAGEMENT EXCELLENCE (CIME)**

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

**October 10 - 12, 2023  
New York City**



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



## A Comprehensive, Deeply Impactful, Immersive Learning Experience

Participants emerge with the knowledge, insights, agility and tenacity to lead and manage with greater purpose, inspire ever higher levels of performance, elevate organizational competitiveness, and create a context that fosters candor, creativity and radical collaboration

The Certificate of Insurance Management Excellence (CIME) is an academically rigorous development experience that provides a working knowledge of advanced management and leadership concepts and techniques. The CIME program combines and integrates this knowledge with an expansive how-to understanding of the attributes, characteristics, behaviors, and habits that distinguish the very best leaders

You will learn to dynamically balance growth, profitability, innovation and risk as you fully grasp the increasingly complex challenges faced by insurance leaders and how to address these challenges in a way that advances the organization to a better position in a more demanding future






A group of professionals, including a man in a suit and a woman with glasses, are seated around a table in a meeting, looking at a laptop and documents.

## **An Intensely Distinctive Approach that Accelerates Professional Growth, Expansive Knowledge and Future Ready Capabilities**

Management and leadership better practices and contemporary frameworks are covered through highly engaging and fast paced tutorials. The content is uniquely robust, immensely interactive, and enlivened through actual insurance case studies that infuses and invigorates participants with profound insights and powerful new knowledge that can be applied to the immediate benefit of their organization. The CIME program is a defining milestone along your continuous journey toward becoming all you can be.

A person wearing a mountain climbing suit and goggles is pointing towards a snow-capped mountain range under a clear blue sky.

**All learning pivots on who we think we are, and who we see ourselves becoming**

- Frank Smith

The CIME curriculum is organized around six domains of knowledge that convey a deep understanding of how organizations function at their 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 others



## **A Rigorous Curriculum That Imparts the Knowledge, Passion and Will to Lead**

The CIME program syllabus has been developed to uniquely equip participants with both the knowledge that are the 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 integrated and systematic solutions to increasingly complex problems. All while developing the foresight and honing a managerial mindset to anticipate opportunities and successfully stage meaningful innovations

## **Core Topical Domains: The Six Building Blocks of Managerial Excellence**







# Strategic Leadership

As the insurance industry and the society it serves continues to transform in an accelerated fashion and in multi-dimensional ways, crafting and executing creative, smartly accurate and differentiating strategies are more critical than ever before. But just as insurance is no longer business as usual, so it is that traditional strategic planning is giving way to more nimble, agile and opportunistic strategic leadership frameworks, techniques and tools. This CIME tutorial is a deep dive into the newly emerging disciplines by which Insurance leaders craft and manage strategies that are laser focused on profitably expanding their total addressable market; leveraging analytics to anticipate and gain competitive relevancy through innovations; renew and reimagine the organization from the outside in; and to create and deliver ever higher levels of value to achieve sustainable real growth

Arrayed and systematically evaluating strategic options;  
Crafting and executing a winning strategic program;  
Critical strategic thinking and mindfulness

Strategic planning and decision making in times of  
discontinuity, uncertainty and ambiguity

Business architecture modeling techniques and  
frameworks: Organizational design and development

Creating strategic resonance throughout the organization;  
Facilitating the development and integration of cross  
functional strategies; Thinking and acting holistically

Conducting accurate evidenced based strategic  
performance assessments and diagnostics

Expanding the total addressable market; Strategically  
defining the expressed, unexpressed, current and future  
needs and wants of customers

Detailing the path forward: Strategic action blue printing;  
Tactical planning as the vital link between strategy  
formulation and strategic execution

Sharpening the organization's ability to predict, anticipate,  
and respond to the forces of change and opportunities  
within the competitive landscape

Capitalizing the strategic agenda; Eliminating activities and  
projects that are not strategically essential, reducing  
organizational bureaucracy, abandoning past decisions and  
rules that are no longer a strategic fit: How leaders say no  
to say yes

Designing, building and applying advanced strategic  
metrics, analytics and scorecards; Leveraging AI to reveal  
strategic patterns and considerations

Identifying and purging the barriers and  
organizational anchors that serve as a drag against  
strategic traction and progress

Balancing daily operational management with  
leadership efforts in advancing toward the strategic  
vision; Navigating the organization through  
transitions

Defining and managing the organization's internals  
based on an unblinking truthful assessment of  
external forces, competition, and potentially  
disruptive developments

Being strategically nimble and agile; Making strategic  
adjustments and recalibrations; Leading in times of  
crisis and the unexpected



**Strategy is about setting yourself apart from the competition. It's not only a matter of being better at what you do – it's more a matter of being significantly and meaningful different at what you do – Michael Porter**

# Leadership Communications



Goal oriented communications – using words to create the desired movement to the desired goal at the desired pace in the desired direction

Creating new realities and awareness through what leaders say and how they say it

Using words and pictures to engage people at both the rational and emotional levels

The new science and framework for effective and active listening; Tools and techniques to sincerely seek first to listen before seeking to be listened to

The 4W model of leadership communications: What message to send, What knowledge to convey, What feeling to impart, What action for people to take

Understanding how people think and reducing bias; The interrelationship between behavioral economics and cognitive leadership communication

Shaping and delivering a successful argument; Leadership negotiations and overcoming objections

Knowing and accurately reading your audience and adapting your communications style accordingly

The CIOP Institute's IDEA communications model: Inform & Inspire, Decide & Do, Elevate & Enroll, Align & Amplify

The Leadership Communications Index (LCI): Identifying and understanding your communications strengths to build upon and opportunities to improve your communication skills

Creating concise communications by focusing on the one most impactful and pivotal point and mitigating all that is extraneous

Leadership credibility does not arise from a position of authority but from the ability to inspire others to achieve enduring superior organizational performance. And the ability to inspire people, to have them see and reach for the possible, can only be achieved through highly effective and compelling leadership communication skills. This CIME tutorial illustrates how leaders use words to create the desired movement in others. How leaders shape, energize and reinforce organizational vitality through memorable phrases, vivid pictures and heartfelt stories. You will learn how to craft and deliver a message that motivates positive action while instilling courage and confidence. Through this tutorial you will learn how to calibrate and adjust your communication approach to the preferred communication style of individuals and apply the very best practices in delivering powerful group presentations in person and virtually. You will discover how to master the written as well as verbal and non-verbal techniques in making an indelible impression in creating leadership presence

The art and science of crafting and delivering memorable group presentations, Talk like TED training, lessons drawn from the most powerful speeches; Robust leadership communication techniques within a virtual and remote setting

The power of stories; The content and delivery of memorable leadership story telling; When and how best to use humor

Mastering the Leadership Communications Compass: Up, down, peer-to-peer, and to outside stakeholders and clients

Leadership communications to unleash the discretionary effort of people and translate their potential into performance; How leaders make it safe for people to speak, share their ideas and raise their concerns

How to speak up with confidence, integrity, courage and conviction; Communicating in the moment; Making the prepared and rehearsed look, feel and sound extemporaneous



**A “no” uttered from the deepest conviction is better than a “yes” uttered to please or, what is worse, to avoid trouble, disagreement or conflict**

**– Mahatma Gandhi**



# Marketing Leadership



Accelerate the design and delivery of value adding insurance products and services that are not easily replicated by competition

Mastering marketing analytics: combining market data, predictive and prescriptive analytics in shaping market strategies and supporting tactical sales efforts

The new marketing science and frameworks to better define and target market segments, cohorts and customer personas

Lessons from the field: Case studies of the best insurance customer experience innovations and success stories

Understanding and applying behavioral economics to improve the accuracy and effectiveness of marketing decision making and execution

Developing and amplifying the organization's brand strategy while monetizing brand equity: How to make each staff member a brand ambassador for your firm

Designing and building a complete marketing and customer centric insurance business ecosystem

Navigating the organization from being primarily reactive transaction based to proactive customer relationship based

Technology enabled marketing success: How digital, mobile, AI, and social media are reshaping the insurance consumer marketplace and carrier-customer interactions

Understanding the science and art of insurance product pricing; Developing and reinforcing consistently applied individual risk selection and account pricing strategies, tactics and mechanisms

The CIME Marketing Leadership tutorial examines the changing dynamics of the insurance marketplace; enabling you to adapt and innovate in a more agile fashion in precisely and effectively targeting, pursuing, acquiring and growing profitable customer relationships. Building upon a foundation of marketing fundamentals, the program provides a multi-faceted understanding of contemporary concepts emanating from data driven insights, new marketing management frameworks, and the techniques to inculcate customer centricity into the very DNA of your organization. You will learn how to design and deliver a seamless customer experience across all functional, digital and human touchpoints and interactions. In this era of business and societal discontinuity and disruption one aspect of leadership is certain: The truth of who we are, how good we are, will always be determined by the marketplace. When you emerge from this tutorial, you will be equipped with insights that will help you contribute to making your organization a market leader and preferred insurance customer destination

Understanding and operationalizing the new insurance marketing construct: From make-and-sell to sense-and-respond

Managing and optimizing the new 5 C's of insurance marketing leadership: Customer solution, Customer effort, Customer convenience, Customer communication, Customer cost

Designing and integrating the new insurance marketing mix with the new insurance customer mix

Forging marketing resonance and convergence among insurance business functions, lines of business, direct and intermediary channels

A blinding glimpse of the future insurance market leaders: The characteristics of tomorrow's market winning insurance carriers



**People shop and learn in a whole new way compared to just a few years ago, so organizations need to adapt or risk extinction**  
– Brian Halligan

# Personal Leadership



Enhancing your presence and impact by evaluating your leadership style and understanding corresponding avenues for self improvement: the Leadership Style Index (LSI)

A survey and analysis of leadership archetypes; Identifying areas of common linkages among the archetype models in shaping your own leadership style and behavior

What it takes to truly empower people and make them ready to be empowered

Building, managing, contributing to your own leadership network within and outside the insurance industry; Choosing people to serve on your own personal board of directors

Developing a cultural setting that encourages truthful candor while surfacing and resolving conflicting agendas

Building trust and earning respect beyond position: Fostering value centered leadership through wisdom, elegance and grace; Understanding and managing your biases

Leadership mindfulness: Honoring your past, fully understanding the present, shaping the future

Leadership symbols and ceremonies that help anchor the organization's soul, celebrate its spirit and create a sense of pride and community among all staff members

The servant, first assistant, leadership model: Removing the obstacles and bureaucratic artifacts that get in the way of staff doing their work and fulfilling the organization's true potential

In these rapidly changing and challenging times there is a hunger, a yearning, for better, far more transformative leadership. These are the leaders who model the way forward, inspire us to be part of a greater purpose, while constantly creating and reinforcing a context that ignites creativity and the passion to achieve ever higher levels of performance. These are the leaders who truly understand that to transform an organization and breath life into a vision of what is truly possible requires that they must also transform themselves. And that such personal transformation is a continuous journey of self discovery. The CIME Personal Leadership tutorial provides the learnings, concepts, frameworks and insights to develop yourself by becoming more self aware. And through this enlightenment help you shape and accelerate your own path toward achieving your personal goals in becoming the leader you yourself yearn to be

Fostering radical collaboration throughout the organization; Progressing from the traditional heroic leader to the interdependent leader; Managing conflict

The leader as entrepreneur: Creating new opportunities, seizing the initiative and making great things happen; translating vision into reality through managerial grit and leadership fortitude; Investment based decision making

Uncovering the leadership habits that serve as anchors: Mastering the eight atomic habits of successful leaders

Striking the right leadership balance of inclusivity, diversity, legacy and new, compromise and conviction, tradition and innovation, risk and safety, satisfaction and hunger, intuition and analysis, loyalty and letting go

Developing a personal journey roadmap with clear milestones for achieving your goals in becoming a future ready leader



**Step into the fire of self discovery. This fire will not burn you; it will only burn what you are not - Mooji**





# Digital Leadership

The digital leadership DANCE: Data, Algorithms, Networking, Cloud, Exponentially improving hardware

How emerging technologies are converging in creating near zero marginal cost in customer acquisition and servicing

The power of platforms: How platforms create superior insurance business ecosystems and operating models

Blockchain frameworks and fundamentals; the implication for insurance financial transactions

Understanding the new digital no-touch operations model: An illustration of the future insurance operations model from transaction labor intensive to proactive digital relationship enabled

Developing the insurance digital strategy: Optimizing, combining and integrating machine, platform and crowd

Case study: How edge computing and visual-at-point enhances information gathering, risk selection, coverage setting, account pricing and claims adjudication

Understanding and leading in a world increasingly redefined through big data, AI, machine and deep learning, neural networks, IoT

Digital evaluation leadership tools including MIT tradespace, pugh, design structure matrix

Digital enabled superior user and customer experiences: Best interface design fundamentals and practices: Bots and Bodies integrations; The discipline of UX A/B design

Fundamentals of cyber security: Proactive Red and Blue Teaming in combination with black swan response

Zero Based Integrated Design & Delivery: Integrating from-scratch product, marketing, and servicing through design thinking and enabling technologies; A commercial lines insurance case study

The explosive expansion of advanced technologies in reshaping how people live and work is exerting a profound influence on insurance organizations. Customers are becoming far more sensitive in the use of technology and their expectation of how technology either improves or detracts from their experience. Whether that experience relates to making a transaction on Amazon, building and interacting with their network via social media, or buying insurance. Simply put, digitalization of insurance processes, products and practices is essential in advancing the competitiveness of the enterprise, enhancing decision making and enabling all insurance functions in becoming future ready. Technology is so strategically critical that it can no longer be left primarily to an insurance organization's IT division. It demands that all insurance leaders become digitally savvy; Leaders with the awareness and ability to blend business, data, and technology in solving today's challenges while anticipating and seizing emerging opportunities. The CIME Digital Leadership tutorial conveys an informed awareness and deeper understanding of contemporary technology architectures, trends, and applications. Through this learning you will gain the insights and acumen to turn technology from a potential inhibitor to a catalyst in delivering higher levels of performance, sparking creativity and accelerating innovation



**Many businesses still make important decisions based on instinct instead of information and evidence. This will change as AI becomes more pervasive; making every company and every employee smarter, faster and more productive – Marc Benioff**

# Authentic Leadership



Creating and constantly forging consistency between and among your actions, values, thoughts, feelings and words

Raising and acting on a higher and more accurate level of self awareness; Finding and amplifying your own leadership voice; Building and reinforcing brand you

Understanding your management strengths and weaknesses; Crafting a postcard from the future managing leader that you are striving to become

Through protected reflective time replay your actions and behaviors: How did that go? What could I have done better?

Fostering relational transparency by accurately assessing your one-to-one relationships; How to repair damaged relationships; Creating relationship building as a core competency and enduring habit

Building a strong moral code; Remaining true to yourself, your values and core beliefs in all situations and with all people regardless of their position; Leading and managing with integrity

The six constructs of managerial emotional intelligence; How to plant the seeds of trust throughout the organization and position yourself as being consistently and dependably trustworthy, credible, believable

Developing and defining yourself in a way that gives people a compelling reason and desire to be led by you

Earning respect based on who you are not based on your position; Holding yourself entirely accountable for your own actions, behaviors, success and failures; Becoming the resilient leader and giving courage and confidence to others; Helping people find their legs and regain their stride after stumbling

These are extraordinary times. The increasingly complex and rapidly changing insurance industry calls for flexibility, resiliency, adaptability and, above all else, balance. This notion of balance is particularly critical in dynamically combining strong leadership with strong management. For both extraordinary leadership and extraordinary management are essential to not only craft a bold and compelling vision but to also relentlessly advance the organization, step by step, toward fulfilling this vision. The new challenge is to be both a visionary leader as well as a masterful manager. At times you will need be the leader; a leader that sets about building an organizational context for ever higher levels of performance, creativity and growth. And there will be times that call for you to serve as the enlightened manager; a manager who gets amazing things done each day through people by motivating, solving problems, and modeling the way. The Authentic Leadership tutorial serves as the capstone to your CIME experience. It provides you the framework, process and opportunity to reflect upon and begin applying the learnings gained throughout the CIME program in shaping your own journey to being both a masterful manager as well as an inspiring leader



**It's about creating an environment in which people refuse to accept mediocrity. It's about pushing against the urge to say that "good enough" is good enough. Don't be in the business of playing it safe. Be in the business of creating possibilities for greatness**

**- Bob Iger**



## Schedule and Venue

The 2023 CIME conference will be conducted October 10 – 12 at the American Management Association (AMA) Conference Center – 1601 Broadway at 48<sup>th</sup> Street in NYC. The Tuesday October 10<sup>th</sup> and Wednesday October 11<sup>th</sup> sessions will begin at 9:am and conclude at 5:pm. The Thursday October 12<sup>th</sup> session will run from 9:am to 12:30pm. The CIME class content is delivered at the graduate level through highly engaging, energizing and interactive discussions. And is further enlivened through insightful case studies, proprietary instruments, and how-to-apply insurance industry illustrations. Seating is therefore very limited to provide the most impactful and immediately beneficial learning experience. Please register early to avoid being wait-listed



## Expansive Insights + Deep Impact

A transformational learning opportunity designed to amplify and accelerate your managerial capabilities while imparting a working understanding of the characteristics and behaviors that distinguish impactful leaders. Participants emerge prepared to inspire others to reach for and attain ever higher levels of growth, creativity, innovation and performance. Through the multifaceted CIME curriculum you will gain a powerful grasp of contemporary organizational dynamics and techniques as well as the confidence, courage and influential presence that can only be achieved through being increasingly knowledgeable, self aware and authentic along your own journey to becoming all that you can be

## CERTIFICATE OF INSURANCE MANAGEMENT EXCELLENCE (CIME)

October 10-12, 2023  
American Management Association Conference Center  
1601 Broadway 6th Floor  
New York, NY 10019

### APPLICATION & REGISTRATION

NAME

TITLE & DEPARTMENT

COMPANY NAME

STREET ADDRESS

CITY, STATE, ZIP/POSTAL CODE

TELEPHONE

E-MAIL

**TUITION:** \$2,950 before September 15, 2023 - \$3,200 after September 15, 2023

**TEAM DISCOUNTS:** 10% for teams of 3 – 5, 20% for teams of 5-9, 30% for Teams of 10+

#### PAYMENT METHOD

CREDIT CARD PAYMENT FOR \$ \_\_\_\_\_

Credit Card Number (VISA, MC, AMEX only)

Expiration Date

#### TERMS & CONDITIONS

- Cancellations and substitutions can be accommodated up to September 15<sup>th</sup>
- An administrative charge of \$500 will be assessed cancellations and substitutions

### How to Register:



Phone:  
866.930.CIOP



Fax:  
866.308.9686



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