



#### **OPERATIONAL METRICS, ANALYTICS, AI AND ALGORITHMS:**

Measuring, Predicting and Prescribing Improved Operational Performance

#### **DESIGNING & DEPLOYING THE HIGH PERFORMING ORGANIZATION:**

Operations Strategy, Target Operating Modeling, Transforming Operations into an Enduring Source of Competitive Advantage

#### **TRANSFORMING PROCESSES:**

Reinventing Work to Eliminate Waste, Outdated Work Rules, and Costs, while Designing and Delivering a Truly Differentiating Customer Experience

#### **TECHNOLOGY ENABLED OPERATIONS:**

Technology Fundamentals, the New Digital & Gen AI Trends and Forces of Disruption that are Reshaping Products, Core Processes, Operations and Services

#### **TALENT MANAGEMENT & THE LIQUID WORKFORCE:**

Redefining and Leveraging Human Capital for Sustainable Performance through Improved Employee Engagement & Accountability

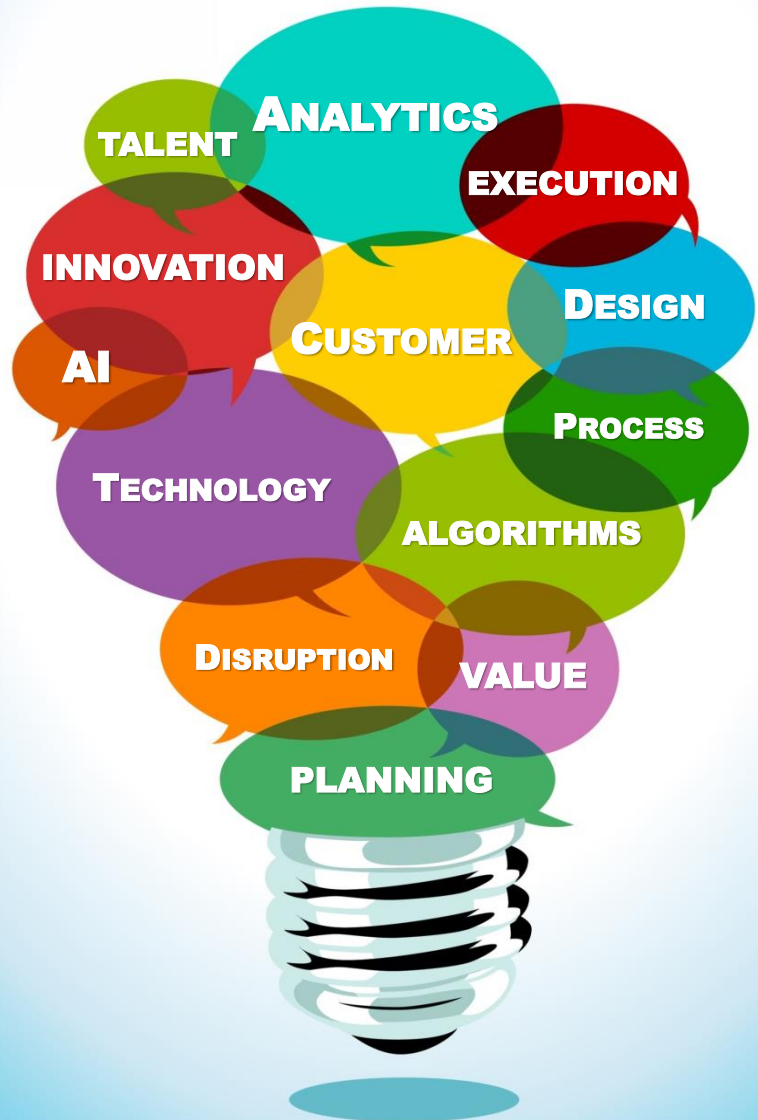
#### **MANAGING CHANGE:**

Planning and Mobilizing for Improved Insurance Operations and Alignment at the Enterprise, Unit and Individual Levels

**June 10-12, 2026**  
**Virtual Distance**  
**Learning**

# **Chartered Insurance Operations Professional (CIOP) Designation Class**

Designing, Building and Leading  
World Class Insurance Operations



## **Professional Recognition for Insurance Industry Leaders and Professionals**

Earn your CIOP designation while mastering underlying business concepts and leading-edge techniques in reducing costs, improving the customer and employee experience while accelerating profitable growth

# The Compelling and Essential Need to Design, Build, Manage and Continually Reimagine Insurance Operations

## Everything is dependent on outstanding

**operations:** Every strategy. Every initiate. Every product. Every new idea. Every business opportunity. Every Technology. Every desired business outcome. To further advance their organization's performance in any and every way today's insurance leaders and professionals must accomplish more than they have ever done before. And to do this they need to build operations that are nimble, agile, resilient and robust. They need to design and deploy innovative processes that not only reduce costs but clearly differentiate the business by delivering a consistent and compelling customer experience. New metrics are needed that are forward looking, point to root causes of performance opportunities, and better enable accurate and timely decisions – at all levels of the organization. Metrics that are further accentuated by predictive and prescriptive analytics. Algorithms that not only replicate routine decision making but also augment the efforts of insurance knowledge workers. Multiple projects must be more effectively managed and collectively coordinated. Insurance leaders and professionals are being challenged to better identify and rapidly implement high impact technologies that truly re-invent, enable, and bring about new modes of doing business. They must reposition and optimize the return on human capital while creating a business context that inspires people, reorients their thinking, eliminates entitlement and creates personal and organizational accountability. Above all else they need to master the underlying bodies of knowledge and emerging business techniques that serve to optimize these operational elements while continually forging higher degrees of alignment and integration among these elements.

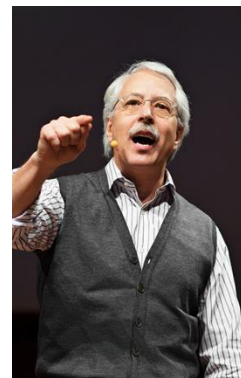
## New knowledge is giving rise to promising innovations and exciting possibilities that are transforming insurance operations.

The emerging insurance industry being pushed, prodded and pulled into a significantly different and discontinuous future demands relentlessly improving operational performance. Carriers that learn and exploit the disruptive forces of change will reinvent, recode and control their operations with far greater precision. They will achieve and sustain ever higher levels of productivity and process mastery. They will gain the operational velocity, acumen and agility to rapidly adjust and allocate resources based on ever changing daily demands; An operational velocity that will accelerate the enterprise past competitors. Waste in all its forms and outdated work rules will be purged. Standards of performance will be aggressively raised. Met. And will be raised and met again and again. Innovations, technologies, projects and initiatives will advance cohesively, far faster, at far less cost and achieve certainty of desired objectives.

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

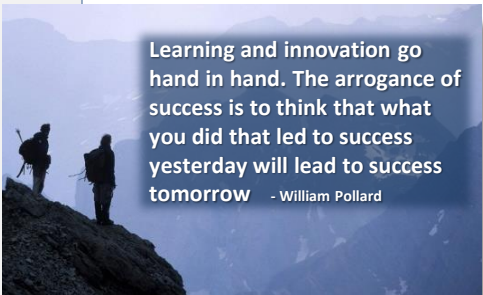


An organization's capacity to improve existing skills and learn new ones is the most defensible competitive advantage of all  
- Gary Hamel



# Gaining Deep Insights for Immediate Benefit, Application and Results

**What got you here will not get you there. Today's more demanding operational context requires more skills, more knowledge, greater competencies.** The CIOP program is a truly rigorous and impactful professional development experience. The two and a half day CIOP class is an unsurpassed content rich presentation of both the key underlying concepts and emerging new techniques in designing, building, engaging and continually improving high performing insurance operations.



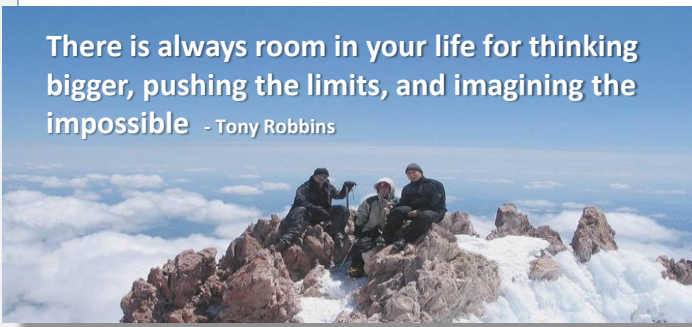
Learning and innovation go hand in hand. The arrogance of success is to think that what you did that led to success yesterday will lead to success tomorrow - William Pollard

**The CIOP curriculum conveys a deep understanding of the essential and critical operational bodies of knowledge.** And proceeds at an accelerated pace.

Advanced concepts and techniques are covered through dynamic tutorial presentations. Each tutorial module is characterized by high engagement, interaction, and lively discussion. The tutorials are intense and energizing combining cutting edge ideas with practical, proven and

enduring operational approaches. The tone is challenging and the delivery is hard hitting – resulting in a highly informative, stimulating, and fast paced development context. Topical content is further brought to life through insightful case studies and “how-to-apply” insurance industry examples. Pre-existing assumptions are challenged and the conference is charged with the excitement of newly informed discussion, new ideas, creative debate and continuous participation. Resulting knowledge and insights are both profound and pragmatic – which participants can immediately apply to the benefit of their organizations as well as to their current and future responsibilities.

**Participants come from all insurance functions:** Recognizing the importance and pervasive nature of operational performance – and such performance is dependent upon a wide range of disciplines and forging tighter integration among these disciplines – CIOP attendees comprise an extensive and diverse group of talented professionals from all functions, divisions and specialties. The CIOP program is for all insurance leaders and professionals that seek a uniquely rewarding learning experience which makes them better in their current position while preparing them for the higher levels of responsibilities they may aspire to.



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

The 2026 Chartered Insurance Operations Professional (CIOP) designation class will be conducted through the CIOP Institute's Instructor Led Virtual Distance Learning Platform from 9:am– 5:15pm Wednesday June 10<sup>th</sup> and Thursday June 11<sup>th</sup>. The Friday June 12<sup>th</sup> session will be conducted from 9:am to 2:00pm.

# Leading Edge Content to Cultivate Powerful Performance

**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 performing 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 engaging, interactive and dynamic. Since its introduction, 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. A high-level listing of some of the topics covered include:

- Modeling, developing, and deploying a high-performance operations strategy & supporting high impact initiatives; Building and executing decision architectures
- Driving operational excellence through new metrics, analytics and big data
- Competing on analytics – leveraging operational data in gaining speed and precision; Building operational algorithms and integrating artificial intelligence
- Insurance operations that consistently deliver an unparalleled customer experience while enhancing employee engagement; Disruption theory and practices
- Consistently delivering world class service and building operationally anchored competitive advantage that improves profit margins and delivers sustainable growth
- Operations that give traction to business strategy, product development, and distribution channels – while eliminating underwriting, sales and claims leakage
- Technology enabled operational excellence: The emerging technologies that will shape insurance operations now and into the future including Generative AI
- Turbo-charging insurance operations, service delivery and call centers
- New frontiers in managing change – Igniting advocacy and building accountability throughout the organization; Influencing without authority and masterful facilitation
- New process design techniques to gain operational speed and flexibility – while eliminating waste in all its forms and adding more and more value
- Customer journey mapping, analysis and designing the optimal customer experience
- Lean operational manufacturing disciplines applied to insurance that significantly simplifies work, and accelerates process flows while contributing to profitable premium growth
- Creating, developing, and executing a human capital strategy and talent program; Building the liquid workforce; Contemporary techniques to creating outstanding teams
- Target operating model & design, business architecture best practices and building outstanding insurance business ecosystems
- Demographic diversity trends & transformation; Insurance customer and employee behavioral impacts and operational considerations

**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**





# The CIOP Designation Process: Pathway to Operational Excellence, Innovation, Professional Mastery and Industry Recognition

**No vendor showcases, no pedestrian ideas, no talking heads, no superficial presentations:** Just compelling relevant knowledge that serves as an execution-focused blueprint for achieving operational innovation and delivering ever higher and resilient levels of performance. The Chartered Insurance Operations Professional (CIOP) designation process equips insurance industry leaders and professionals with the insights to meet head-on the challenges associated with significantly and immediately advancing the operational capabilities of their firms. The CIOP designation does this through a rigorous belief in the power of knowledge as a shaper of performance, a builder of towering talent, a creator of ideas, and an inciter of innovation and positive change. From the very first moment of the very first day of the CIOP program participants gain the knowledge to discover and apply new concepts, tools and techniques. The knowledge and understanding to skillfully examine their operations in an unblinking, factual, and forthright manner. The knowledge to renovate and renew existing structures, processes, practices and people. Knowledge to truly unlock the full potential of the enterprise. The CIOP Designation generates this knowledge through a concise five step process:



**APPLY:** Each candidate completes and submits a CIOP Application and Registration form as contained in this brochure – or the applicant contacts the CIOP Institute directly at 866.930.CIOP to register by phone



**PREP:** 30 days prior to the CIOP Designation Class candidates are provided a preparation package containing relevant thought leadership articles and other reference material, along with detailed virtual distance learning instructions, to begin conditioning new ways of thinking, new learnings and create new compelling possibilities. Textbooks are mailed to attendees two weeks prior to the program



**ENGAGE:** Candidates participate in the two and a half day CIOP Conference that presents the key bodies of knowledge, underlying concepts, tools, and techniques for designing, deploying and continually improving outstanding insurance operations



**CAPSTONE PROJECT:** Recognizing adults learn by doing, participants are provided a take-away assignment that helps them review and reinforce the key concepts covered in the CIOP Conference. This capstone project is intended to be completed with approximately 20 hours of additional effort spread over 180 days; which allows the candidate to complete the assignment while complementing their current daily job responsibilities and providing immediate application and benefit to their sponsoring organizations. Completion of the post conference capstone project results in awarding the CIOP Designation



**CONFERMENT:** The senior leadership of each candidate's sponsoring firm are advised of their candidate's success in attaining the CIOP Designation. An all-points insurance industry press release is distributed announcing the professional achievement of the new CIOP Designees. The graduates receive their CIOP diplomas



**The most difficult thing is to act. The rest is merely tenacity**

- Amelia Earhart

# A Profound Learning Experience Designed for High Impact and Immediate Organizational Benefit

The CIOP Institute's rapid adult learning approach brings **incredible rigor** and speed to the professional development experience; empowering participants to quickly learn and move forward with new energy, new insights and a new powerful toolkit. Instructors foster a context that blends powerful content with dynamic collaboration among attendees. Throughout the CIOP class tutorials are integrated with "work-out" sessions in which participants are provided the opportunity to reinforce, experiment and practice newly learned concepts and ideas. While valuing the grasp of the course content, the CIOP Institute also emphasizes new ways of thinking – providing frameworks for multidimensional problem solving, design, innovation and creation.

**The CIOP Conference is highly interactive and experiential by design** – class attendance is therefore intentionally limited. Tuition is \$3,550 for those registering before May 22 and \$3,950 afterward. A 10% discount is applied for teams of three or more; 20% for 5 or more, 30% for teams of 10 or more. Contact the CIOP Institute at 866.930.CIOP for assistance and to register for the CIOP Designation Class



**It is not only about ideas.  
It is about making ideas  
happen** - Scott Branson

**The CIOP Program is a deeply immersive professional development experience** focused on rapidly providing participants with the knowledge, skills and enriched ability to successfully address immediate operational challenges while navigating their organizations into a better future. The experience is impactful. And its impact lasts a lifetime. It is for the more ambitious insurance carriers that are determined to rise above the weaker firms that act trapped between an unchangeable past and an unknowing future.



**June 10-12, 2026**  
**Virtual Distance Learning**

## HOW TO REGISTER



Phone: 866.930.CIOP



eFax: 866.308.9686



Email:  
pjames@ciopdesignation.com



Mail: CIOP Institute  
2051 Craigmore Dr.  
Suite 200  
Charlotte, NC 28226



## VIRTUAL DISTANCE LEARNING

The 2026 CIOP designation session will be conducted through the CIOP Institute's virtual learning platform. Participants will experience the renowned CIOP Institute's Lean Six Sigma Black Belt certification program in a real time remote highly interactive learning environment. No additional costs on your part as distance learning participants are provided easy to follow instructions and links to the CIOP Institute's secure virtual learning platform – along with immediate real time access to our staff and host for any assistance in preparing for, and throughout, the class. All session materials including program textbooks are mailed to distance learning attendees two weeks prior to class.



## REGISTER EARLY!

Attendance is intentionally limited to support the highest degree of interactive learning. Please register early to avoid being wait-listed

## APPLICATION & REGISTRATION FORM

NAME

TITLE & DEPARTMENT

COMPANY NAME

PHYSICAL MAILING STREET ADDRESS

CITY, STATE, ZIP/POSTAL CODE

TELEPHONE

E-MAIL

**TUITION:** \$3,550 before May 22<sup>nd</sup> – \$3,950 after May 22<sup>nd</sup>

**TEAM DISCOUNTS:** 10% for 3+, 20% for 5+, 30% for 10+

**PAYMENT METHOD:** CREDIT CARD PAYMENT FOR \$ \_\_\_\_\_

Credit Card Number (VISA, MC, AMEX only)

Expiration Date

## TERMS & CONDITIONS

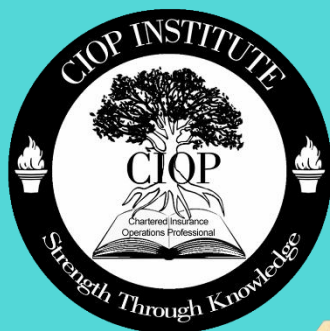
Cancellations and transfers can be accommodated up to April 15<sup>th</sup>.  
An administrative charge of \$700 will be assessed cancellations

## FIRST CLASS



## Virtual Distance Learning

Utilizing the CIOP Institute's instructor led virtual learning platform you can now experience our renowned professional and leadership development programs in a real time remote highly interactive learning environment. No additional costs on your part as distance learning participants are provided easy to follow instructions and links to the CIOP Institute's secure virtual learning platform – along with immediate real time access to our staff and host for any assistance. All session materials including program textbooks are mailed to distance learning attendees two weeks prior to class.



Our virtual remote learning approach is exactly the same as our on-company-site and centrally conducted programs; High impact content delivered through engaging instruction that enables participants to excel in their current position while preparing them for the higher responsibilities they aspire to.

