



Chartered Insurance Operations Professional (CIOP) Designation Class

Designing, Building and Leading World Class Insurance Operations

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Reinventing Work to Eliminate Waste, Outdated Work Rules, and Costs, while Designing and Delivering a Truly Differentiating Customer Experience

AI ENABLED OPERATIONS:

Technology Fundamentals; Machine Learning, Neural Networks, Generative and Agentic Artificial Intelligence and Forces of Innovative Disruption that are Reshaping Insurance Functions, Products, Core Processes, Operations and Services

TALENT MANAGEMENT & THE LIQUID WORKFORCE:

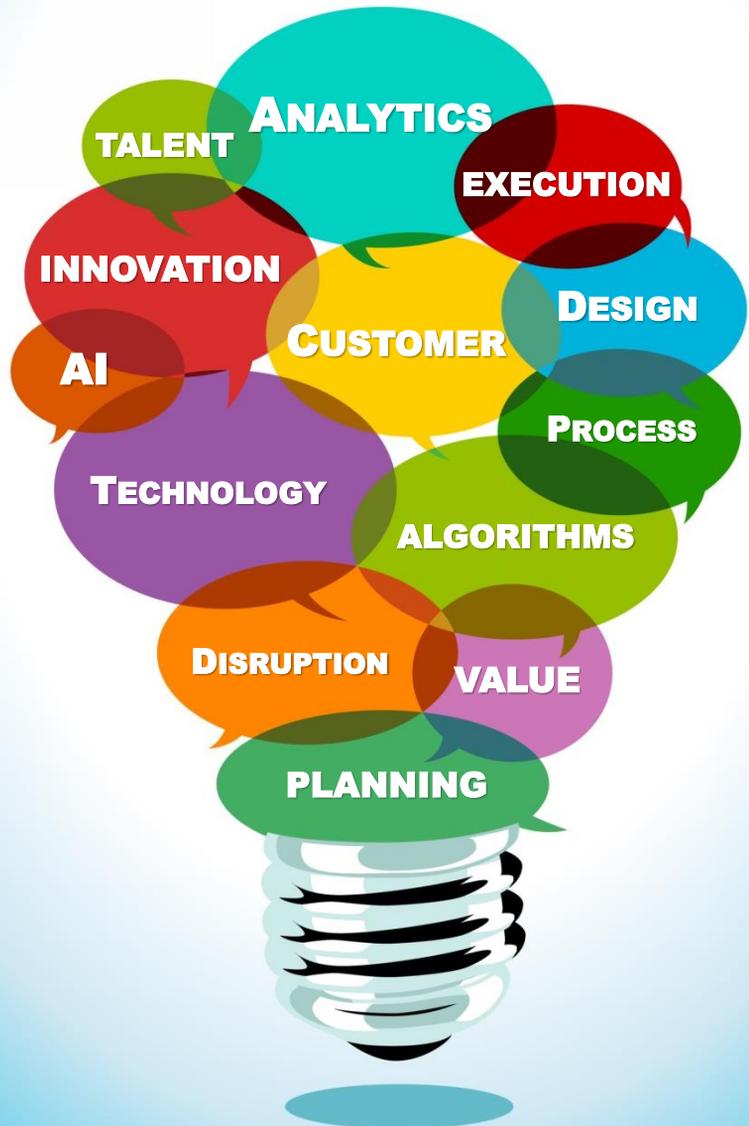
Redefining and Leveraging Human Capital for Sustainable Performance through Improved Employee Engagement & Accountability

MANAGING CHANGE:

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

November 11-13, 2026

Virtual Distance Learning



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

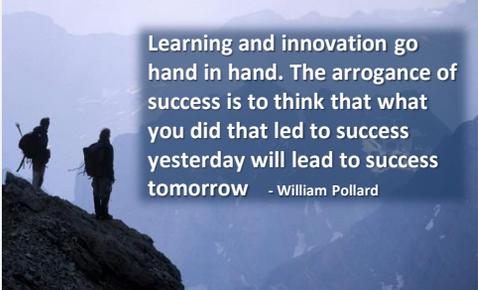


An organization's capacity to improve existing skills and learn new ones is the most defensible competitive advantage of all
- Gary Hamel



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 CIOPI program is a truly rigorous and impactful professional development experience. The two and a half day CIOPI 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.



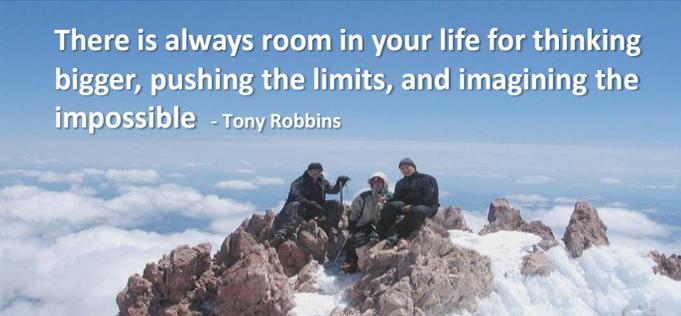
Learning and innovation go hand in hand. The arrogance of success is to think that what you did that led to success yesterday will lead to success tomorrow - William Pollard

The CIOPI 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 – CIOPI attendees comprise an extensive and diverse group of talented professionals from all functions, divisions and specialties. The CIOPI 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 (CIOPI) designation class will be conducted through the CIOPI Institute's popular Instructor Led Virtual Distance Learning Platform from 9:am– 5:15pm Wednesday November 11th and Thursday November 12th. The Friday November 13th 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

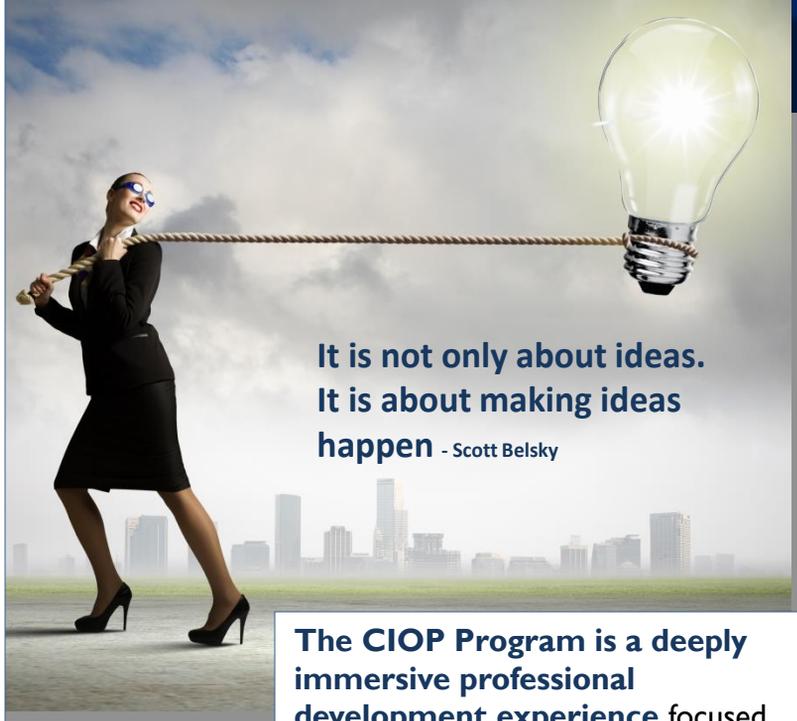


The most difficult thing is to act. The rest is merely tenacity

- Amelia Earhart

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

The CIOPI 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 CIOPI 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 CIOPI Institute also emphasizes new ways of thinking – providing frameworks for multidimensional problem solving, design, innovation and creation.



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

The CIOPI Conference is highly interactive and experiential by design – class attendance is therefore intentionally limited. Tuition is \$3,550 for those registering before October 25th and \$3,950 afterward. A 10% discount is applied for teams of three or more; 20% for 5 or more, 30% for teams of 7 or more. Contact the CIOPI Institute at 866.930.CIOPI for assistance and to register for the CIOPI Designation Class

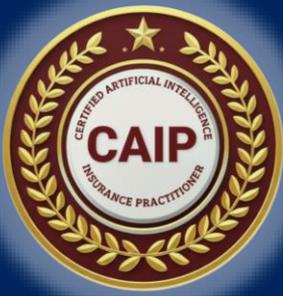
The CIOPI Program is a deeply immersive professional development experience focused on rapidly providing participants with the knowledge, skills and enriched ability to successfully address immediate operational challenges while navigating their organizations into a better future. The experience is impactful. 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.



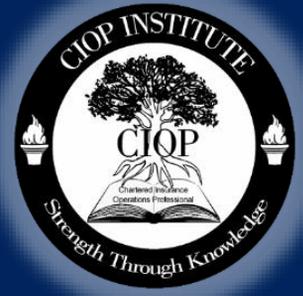
"Dig into every industry and you'll find AI changing and indeed transforming the very nature of work. And such innovations are sparked by people who find fresh ways to look at the world"

- Daniela Rus, Director
MIT AI Laboratory





CHARTERED INSURANCE OPERATIONS PROFESSIONAL (CIOP) DESIGNATION CLASS



November 11-13, 2026
Virtual Distance Learning

HOW TO REGISTER

- Phone: 866.930.CIOP
- eFax: 866.308.9686
- Email: pjames@ciopdesignation.com



The 2026 Chartered Insurance Operations Professional session will be conducted through the CIOP Institute’s popular instructor led virtual learning platform. Participants will experience the world renowned LSSBB professional development 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 STREE ADDRESS

CITY, STATE, ZIP/POSTAL CODE

TELEPHONE

E-MAIL

TUITION: \$3,550 before October 25th – \$3,950 after October 25th

TEAM DISCOUNTS: 10% for 3+, 20% for 5+, 30% for 7+

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 August 15. An administrative charge of 50% will be assessed cancellations

The CIOP Institute
2051 Craigmore – Suite 200
Charlotte, NC 28226

FIRST CLASS

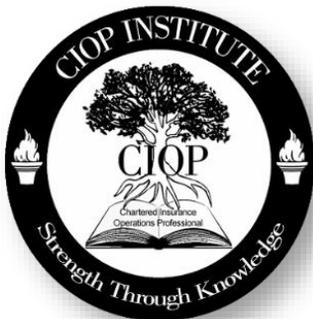


The Most Powerful Virtual Distance Learning Experience!

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.

Fall in love with the never-ending process of becoming the next best version of yourself
- Mary Oliver

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.



CIOP Institute
866.930.CIOP
www.CIOPInstitute.com