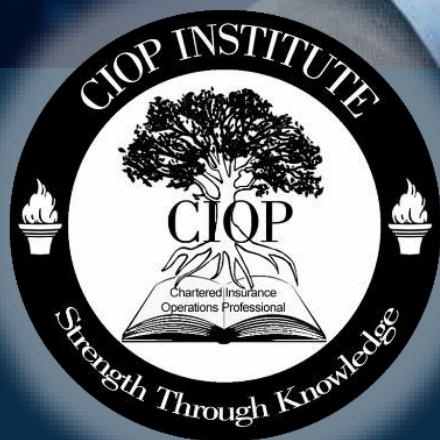




**Chartered Insurance
Operational Professional
(CIOP) Designation
Program**

**Designing, Developing and
Leading Future Ready High
Performing Insurance
Operations**

**November 11-13, 2026
Instructor Led Virtual
Distance Learning**



Earn your CIOP designation by mastering underlying business concepts and leading-edge techniques in building a highly integrated platform of enabling performance elements in reducing costs, simplifying and accelerating value adding work, delivering a delightful customer and employee experience while achieving ever higher levels of productivity, operational innovation and profitable real growth

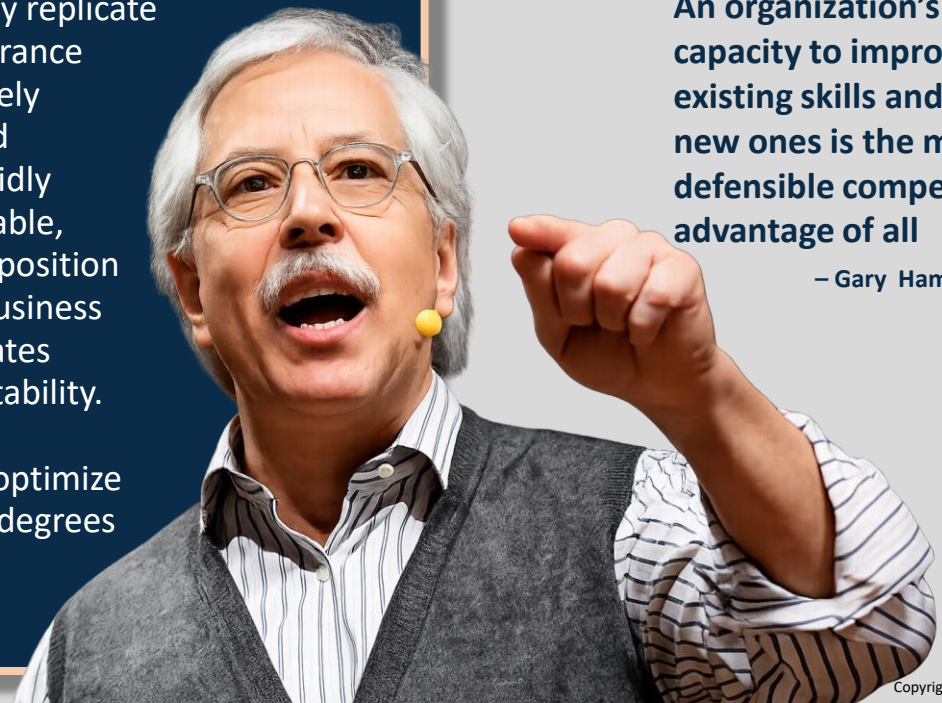


Everything is dependent on outstanding operations: Every strategy. Every initiative. Every product. Every new idea. Every business opportunity. Every new technology. Every desired business outcome. To further advance their organization's performance in any and every way today's insurance leaders and 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.



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

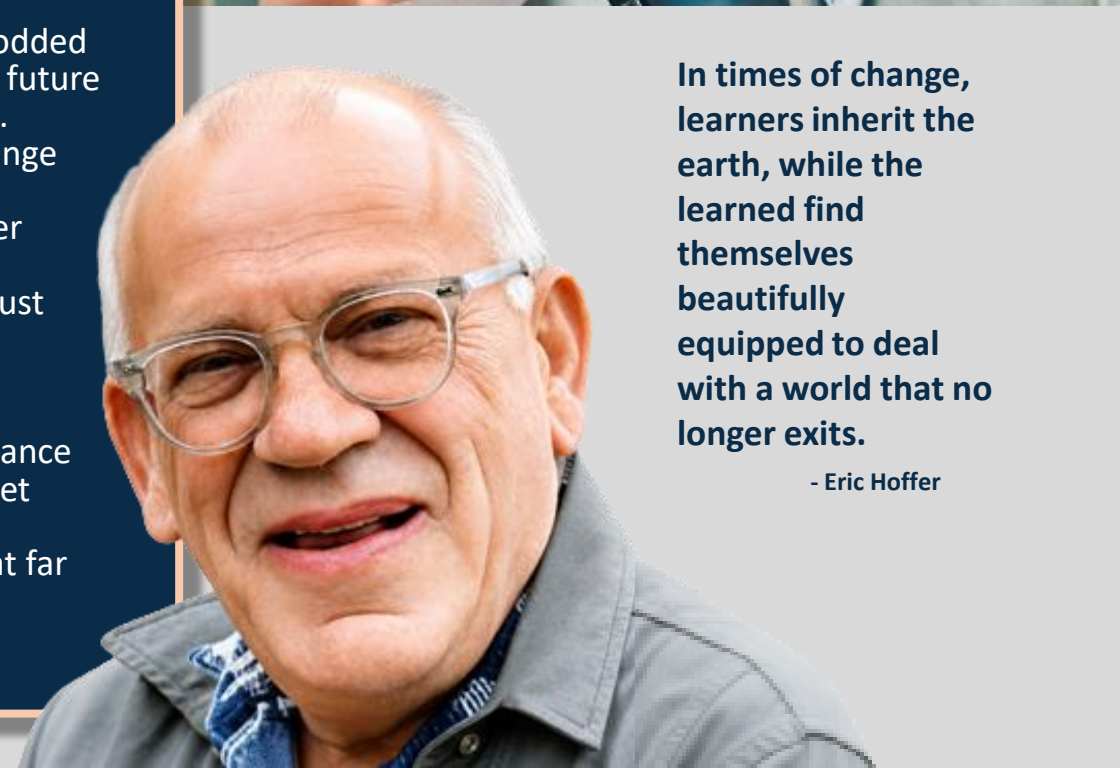
– Gary Hamel





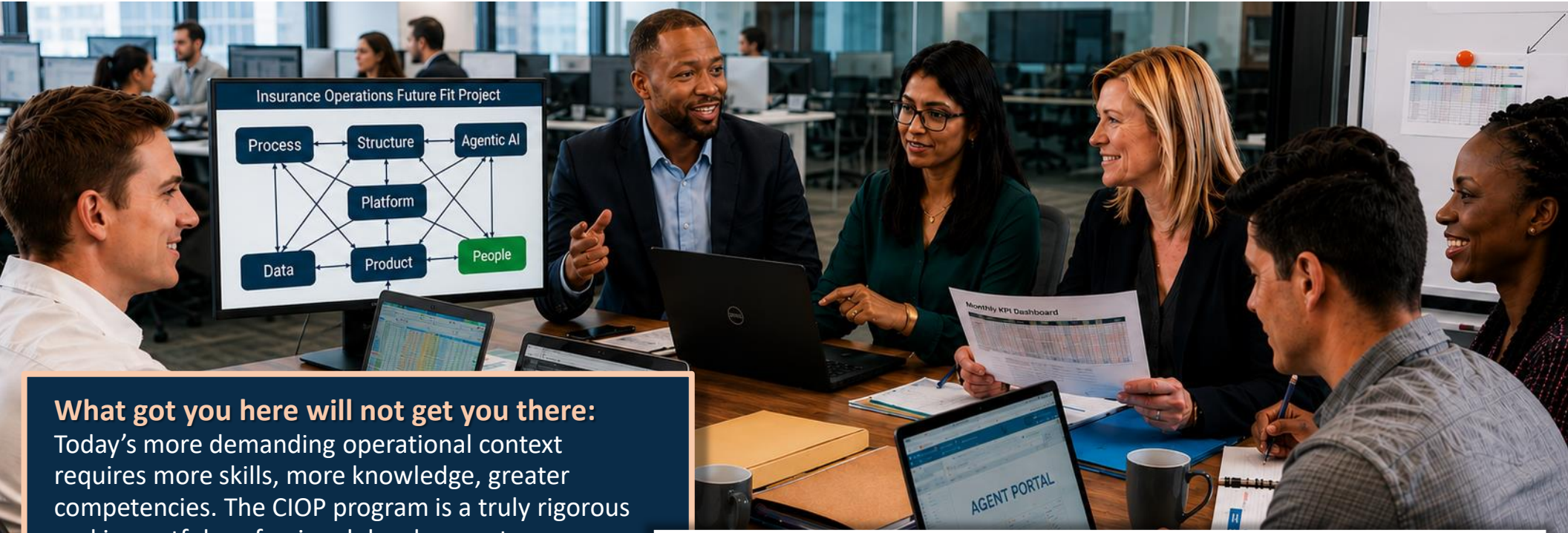
Transformative technologies enlivened by new knowledge and bold imagination is giving rise to promising innovations and exciting possibilities that are transforming insurance operations

The emerging insurance industry that is 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, and artificial intelligence 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 exits.

- Eric Hoffer

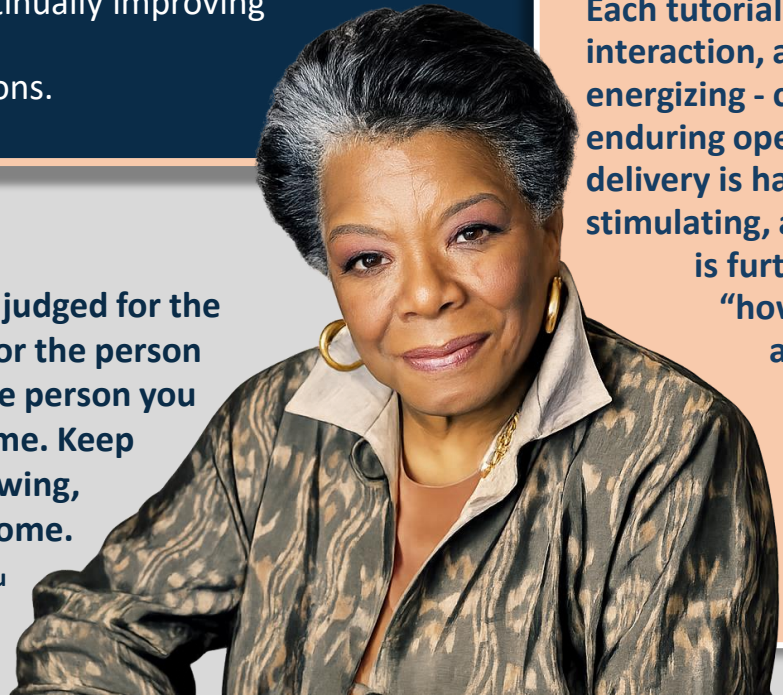


What got you here will not get you there: Today's more demanding operational context requires more skills, more knowledge, greater competencies. The CIOP program is a truly rigorous and impactful professional development experience. The two and a half day CIOP class is an unsurpassed content rich presentation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

The CIOP curriculum conveys a deep working 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.

You should not be judged for the person you were, or the person you are, but for the person you are trying to become. Keep learning, keep growing, keep trying to become.

- Maya Angelou



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. The CIOP Designation is the globally recognized standard of knowledge and professionalism for all insurance leaders and professionals who are dedicated to continually improving the performance of their organizations; bringing out the very best in their people and fulfilling the true potential of the enterprise, now and within a rapidly emerging future insurance industry.

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



01

ORGANIZATIONAL STRUCTURING, MODELING, developing and deploying a high-performance operational strategy & supporting high impact operational initiatives; Building and executing operational decision architectures

02

DRIVING OPERATIONAL EXCELLENCE through new metrics, analytics and big data; Understanding data typographies and ensuring operational data cleansing

03

COMPETING ON ANALYTICS: leveraging operational data in gaining speed and precision; Building operational algorithms, OKR's and integrating artificial intelligence, generative AI and Agentic AI; Standards setting best practices

04

INSURANCE OPERATIONAL INNOVATIVE DESIGNS that delivers an unparalleled customer experience while enhancing employee engagement; New operational modeling and navigating model transitions

05

CONSISTENTLY DELIVERING WORLD CLASS SERVICE and building operationally anchored competitive advantage that improves profit margins and delivers sustainable growth; Insurance operations disruption theory and practices

06

OPERATIONS THAT GIVE TRACTION TO BUSINESS STRATEGY, product development, and distribution channels – while eliminating underwriting, sales and claims leakage, waste and simplifying functional processes and workflows

07

TECHNOLOGY ENABLED OPERATIONAL EXCELLENCE: The emerging technologies that are reshaping insurance operations now and into the future including Machine Learning, Cooperative Knowledge, and Agentic AI Enabled Operations

08

TURBO-CHARGING INSURANCE OPERATIONS, service delivery and call centers; designing and building the future model insurance office

09

NEW FRONTIERS IN MANAGING CHANGE: Igniting advocacy and infusing accountability throughout the organization; From command and control to masterful coaching for empowerment and developing the whole person

10

NEW PROCESS DESIGN TECHNIQUES to gain operational speed and agility – while eliminating waste in all its forms and elevating each work step's value

11

CUSTOMER JOURNEY MAPPING, ANALYSIS AND DESIGNING the optimal customer experience; customer experience metrics from NPS to CES; Operations that make the organization easy to do business with; and for employees to feel fulfilled in their work

12

LEAN OPERATIONAL MANUFACTURING DISCIPLINES applied to insurance that significantly reduces work efforts and costs, while accelerating process flows and flow time efficiencies contributing to profitable premium growth

13

CREATING, DEVELOPING, AND EXECUTING A HUMAN CAPITAL STRATEGY that elevates people and enhances their potential; Building the liquid workforce; Contemporary techniques to build high performing super teams; The transition to self development


14

TARGET OPERATING MODEL AND DESIGN, business architecture best practices and building outstanding insurance business ecosystems; operational model transitions


15

DEMOGRAPHIC DIVERSITY TRENDS & TRANSFORMATION; Insurance customer and employee behavioral impacts and operational considerations; Understanding and applying intellectual diversity and a new Growth Mindset culture throughout the firm


The CIOP Designation Process: Five Steps Toward Achieving the Next Very Best Version of Yourself




APPLICATION AND REGISTRATION: Each candidate completes and submits a Chartered Insurance Operations Professional registration form as contained in this brochure by calling the CIOP Institute (866.930.CIOP) - or by Email or eFax to svallen@ciopdesignation.com




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



CONFERENCE PARTICIPATION: Candidates are immersed in the two-and-a-half-day instructor led virtual distant learning CIOP Class that comprehensively imparts the bodies of knowledge, concepts, tools, and techniques for successfully initiating, shaping, and continuously improving outstanding insurance operations while elevating the work and people of the enterprise




CIOP CAPSTONE PROJECT: Recognizing adults learn by doing, participants are provided a take-away assignment that helps them review, reinforce and begin applying their new knowledge to the immediate benefit of their sponsoring organizations. Candidates are provided six months to complete the CIOP Capstone which enables candidates to attend to the CIOP assignment while complementing their current daily job responsibilities.



CONFERMENT: Completion of the post conference Capstone Project results in awarding of the coveted Chartered Insurance Operations Professional (CIOP) as well as the Certified Artificial Intelligence Insurance Practitioner (CAIP) designations. The senior leadership of each candidate's sponsoring firm are advised of their candidate's professional development success and designation awards. The graduates receive their CIOP diplomas

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 deep 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. The CIOP Institute also amplifies new ways of thinking: providing frameworks for multidimensional problem solving and bold innovations



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

- Amelia Earhart

Schedule and Venue

The 2026 CIOP Designation session will be conducted through the Institute's popular instructor led virtual learning platform. Participants will experience the world-renowned CIOP professional development program in a real time remote highly interactive learning environment. This dynamic remote learning approach is exactly the same as being on-site; High impact content delivered by insurance savvy instructors that enables participants to excel in their current position while preparing them for the higher responsibilities they aspire to. Each topic is characterized by high engagement, intense interaction, lively discussion and continuous participation. And is further enlivened through rigorous cases studies, dynamic role plays, insurance applications and demonstrations. The tone is challenging and the content robust – providing a highly informative, stimulating and fast paced learning experience. Resulting knowledge is both profound and pragmatic which participants can immediately apply to the benefit of their organizations as well as to their current and their future responsibilities.

The CIOP conference will be conducted Wednesday November 11th through Friday November 13th. Each daily session will begin at 9:am. The Wednesday and Thursday sessions will conclude at 5:pm with the Friday finishing at 2:00pm. There will be a 90-minute lunch break Wednesday and Thursday.

"We are excited about the CIOP professional development program. It elevates our discipline and provides us a track for the ongoing development of ourselves as leaders and our staff. We want our management to draw from a well filled tool chest. We also see this knowledge as a powerful contributor to our culture: Doing the right things the right way at the right time." – Zurich Insurance

"To the authors and creators of the CIOP Designation program...thanks! The class curriculum was well thought out and organized. The instructors were simply superb. The follow up exam project and exercise were practical, timely and immediately rewarding to our organization. What a great investment for our organization." – Liberty Mutual



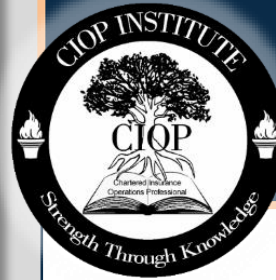
"The CIOP program has been tremendously beneficial for our team. As we work together there is often a reference back to the material we learned as we apply this to our daily work. I have not seen this type of learning experience from any class that I have attended. So, in addition to the material offered, the experience of working the capstone project as a team has left a lasting mark on us and has built a common understanding that we are consistently leveraging."

– Chubb Insurance

Chartered Insurance Operations Professional (CIOP) Designation Program

Application & Registration

November 11-13, 2026



NAME

COMPANY NAME

POSITION TITLE & DEPARTMENT

STREET ADDRESS

CITY, STATE/PROVINCE ZIP/POSTAL CODE, COUNTRY

TELEPHONE

E-MAIL

TUITION: \$3,550 before October 25, 2026 - \$3,950 after October 25, 2026

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

CREDIT CARD PAYMENT FOR \$ _____

Credit Card Number (VISA, MC, AMEX only)

Expiration Date

TERMS & CONDITIONS

- Cancellations and substitutions can be accommodated up to August 15th
- An administrative charge of 30% will be assessed cancellations

How to Register:



Phone:
866.930.CIOP



eFax:
866.308.9686



Email:
svallen@CIOPDesignation.com