

44 Proven Strategies for

Promoting CPCU/IIA Professional Development

Many successful insurance organizations know that a knowledgeable work force is a competitive advantage. Here are 44 specific techniques that successful companies have used to encourage the professional development of their employees. Choose the ones that will work best for you!

Publicize the Support of Top Executives

- Develop a strategic goal to promote insurance education throughout the organization and to increase CPCU and IIA enrollments.
- Honor new CPCU designees by holding a reception or dinner in connection with the national conferment ceremony.
 - ◆ Involve the CEO or another top executive as host or speaker.
 - ◆ Include a photo in the company newsletter.
- Distribute annual information from the CEO to senior executives regarding the organization's "participation rate" in educational programs, demonstrating the CEO's personal interest.
- Publish in the employee publication a series of profiles of senior executives emphasizing the role of insurance education in their careers.
- Feature CPCU/IIA in the company's annual report with pictures and profiles of completers, testimonials from executives, and a summary of financial support as an investment in the future.
- Furnish key executives the names of course and program completers and encourage them to send a congratulatory message to each individual.

Promoting Professional Development

- Publicize the Support of Top Executives
- Develop the Support of Managers Throughout the Organization
- Publicize Courses and Programs Throughout the Organization
- Reward Educational Efforts and Achievements
- Provide Support for Active Candidates

**Send educational
bonus awards
through line
managers!**

**Schedule
company-wide
education days!**

Develop the Support of Managers Throughout the Organization

- Require that managers include a professional development goal in annual performance objectives.
- Ask home office executives to stress education with both managers and employees when visiting field offices.
- Send educational bonus awards, achievement certificates, congratulatory letters, expense reimbursement, and symbolic awards (such as flowers) through line managers.
- Ask managers to serve as educational mentors or personal sponsors of employees who take Institute courses.
- Invite line managers to help in planning education days, career days, and other promotion campaigns.
- Actively promote educational opportunities available to middle managers and line managers. They should show educational leadership by example.

Publicize Courses and Programs Throughout the Organization

- Encourage each employee to take individual responsibility for maximizing his or her career potential by emphasizing the long-range benefits of professional development.
- Appoint an education coordinator in each major department or office.
- Schedule annual or semi-annual company-wide education days, and encourage local offices to schedule their own e-days.
 - ◆ Invite the local CPCU chapter and organizations that sponsor CPCU and IIA courses to participate.
 - ◆ Invite local colleges that sponsor CPCU and IIA courses and those that offer college credit for passing CPCU and IIA courses.
 - ◆ Invite an Institute representative to participate.
- Publish an annual education issue in the company newsletter, preferably timed to coincide with the education day or career day event.
- Provide counseling or use the Institutes' free course-selection counseling service.
- Include desired and required insurance education in position descriptions and in job postings.

Reward Educational Efforts and Achievements

- Pay all expenses for new CPCU designees and their spouses (or companions) to attend the national conferment ceremony and the CPCU Society Annual Meeting and Seminars.
- Publicize the company reception or dinner held in connection with the CPCU national conferment ceremony. Use photos and quotes that demonstrate top management support.
- Have top executives present a CPCU key to each new designee. (Jewelry items are also available for IIA program completers.)
- Give cash awards for course and program completion.
- Provide continuing recognition to CPCUs who requalify (at two-year intervals) under the CPCU Continuing Professional Development (CPD) program.
- Give “downstream” recognition after program completion to help retain educated employees and to remind them that their past educational accomplishments continue to benefit the organization.
- Mention educational accomplishments and designations when announcing promotions.
- Arrange for or pay for the framing of diplomas and certificates, and encourage their display in the office.
- Include designations on letterheads, business cards, memo pads, name plates, and distribution lists, and in office directories.
- Recognize CPCUs as a talent pool, drawing on them as educational and idea resources for the company.
- Pay CPCU and other professional society dues.
- Give special recognition to employees who serve as CPCU and IIA course leaders and as personal sponsors.
- Make sure passers and completers receive at least one congratulatory letter from a superior, with copies to the employee’s personnel file as appropriate.
- Hold an annual achievement recognition event in all offices, inviting all course and program completers and their immediate supervisors.
- Recognize educational efforts during each employee’s performance appraisal.
- Remember to recognize the support provided by spouses, mentors, supervisors, and significant others.
- Recognize IIA Associate Program completers as soon as possible after they receive their final report cards.

Use photos and quotes that demonstrate top management support!

Recognize CPCUs as a talent pool!

Hold an annual achievement recognition event!

Provide Support for Active Candidates

- Stress the career-enhancing potential of earning the most highly respected professional credential in property-casualty insurance.
 - ◆ Pursuing CPCU increases professional knowledge to enhance job performance
 - ◆ Earning the CPCU designation is an achievement that demonstrates commitment and self-discipline
- Encourage each employee to take individual responsibility for maximizing his or her career potential.
- Provide some on-the-job time for educational activities such as classes, final review, and taking the exam.
- Monitor in-house class attendance and contact apparent dropouts.
- Monitor and support the activities of independent learners and study groups.
- Provide counseling for those who have second thoughts about education or who suspect they may have selected the wrong course.
- Provide support for conscientious dropouts. Keep the door open for the future.
- Provide support for non-passers. Recognize the risks they took and the benefits they gained, and encourage trying again.
- Don't expect immediate results from a change in educational policy. It takes time to complete educational programs and to change a culture.
- Encourage employees to sign up for the CPCU Candidate Mentoring Program, which will connect them with a mentor in the local CPCU Society Chapter, or develop your own in-house personal sponsorship program.

To discuss these ideas or others, contact:

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