

The Institutes' Management Education



**Business Strategy for Emerging Risk
and Insurance Leaders**

May 14 – 18, 2018



CENTER FOR
PROFESSIONAL
& EXECUTIVE
DEVELOPMENT





“ *The Institutes’ Management Education program was a great blend of excellent lecture, group activities and practical application. The faculty and staff were top notch, the accommodations excellent and my peer participants inspiring!* ”

LISA HOLMAN

Director, Contact Center Operations
Erie Insurance

Business Strategy for Emerging Risk and Insurance Leaders

Brought to you in partnership with the Wisconsin School of Business, University of Wisconsin-Madison, The Institutes' Management Education provides valuable organizational leadership training tailored to the risk management and property-casualty insurance industry.

In today's competitive and continuously changing business environment, managers and supervisors need a solid understanding of core business functions combined with real-world knowledge in order to effectively implement strategies throughout their organization. By participating in the Management Education program, you will learn how to transition from functional management to leadership through a greater understanding of the insurance industry, business, and people.

Sponsoring Partners

The Institutes

The Institutes have been the leading provider of professional education for the risk management and property-casualty insurance industry for more than 100 years.

Institutes knowledge solutions include the premier Chartered Property Casualty Underwriter (CPCU®) professional designation; associate designations in areas such as claims, risk management, underwriting, and reinsurance; introductory and foundation programs; online courses; custom solutions; and continuing education (CE) courses.



Wisconsin School of Business

For decades, the risk management and insurance program at the Wisconsin School of Business has been recognized as one of the top three such programs in the United States, featuring an outstanding faculty, a strong reputation, and a successful alumni base that is active in the global insurance industry.

Known for excellence in program design, program follow-up, and the flexibility to create the best learning solutions for its clients, the Wisconsin School of Business is committed to guiding and inspiring business leaders worldwide.



Who Should Attend

The Management Education program is designed for experienced or high-potential managers and supervisors who are:

- Looking to advance their leadership role within their organization
- In a position to implement organizational strategy

How You Will Benefit

Packed with relevant, interactive sessions, this program will enable you to:

- Learn how to successfully align and implement strategies within your organization
- Understand the operational aspects of executing strategy, such as measuring progress and success
- Develop the organizational leadership skills needed to make a positive impact now and throughout your career
- Enhance your decision-making skills with a deeper understanding of organizational dynamics
- Better understand the current and future state of our industry

How to Register

Go to TheInstitutes.org/ManagementEd to register online, or call **Customer Success at (800) 644-2101**.

Early Bird Discount

Register for The Institutes' Management Education before **March 31, 2018**, to take advantage of the early bird price of **\$4,495!**

When: May 14 to 18, 2018

Cost: **Early Bird Registration:** \$4,495 before March 31, 2018
Full Registration: \$4,995 after May 4, 2018

Cost includes tuition and meals. Lodging is available at the Fluno Center at a reduced rate.

Contact: For more information, contact Karen Lawrence:
(484) 831-9079
Lawrence@TheInstitutes.org





Here's what survey respondents had to say about The Institutes' 2016 Management Education program:

100%

rated the overall program as above-average.

89%

would recommend this program to a colleague.

100%

feel they have gained new knowledge, abilities, or insights that will impact their organizations.

Management Education Program Schedule

Please note that this program agenda is subject to change.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
ARRIVAL	<p>INSURANCE INDUSTRY ACUMEN</p> <ul style="list-style-type: none"> Insurance co. strategy Enterprise Risk Management as framework for managing and leading General insurer performance metrics 	<p>INSURANCE COMPANY STRATEGY</p> <ul style="list-style-type: none"> General strategic thinking skills Understanding the competitive landscape 	<p>LEADERSHIP</p> <ul style="list-style-type: none"> Employee engagement & culture Managing in the matrix 	<p>LEADERSHIP</p> <ul style="list-style-type: none"> Foundational leadership styles Situational and strategic leadership styles Action planning
	LUNCH IN FLUNO DINING ROOM	LUNCH IN FLUNO DINING ROOM	LUNCH IN FLUNO DINING ROOM	LUNCH TO GO
	<p>DECISION MAKING ANOMALIES <i>and</i> INSURER FINANCIAL STATEMENTS</p> <ul style="list-style-type: none"> Making decisions with financial data Relationship of financial statements to individual units within the insurer and overall ERM 	<p>INSURANCE COMPANY STRATEGY</p> <ul style="list-style-type: none"> Evaluating participants own organization's strengths and weaknesses Aligning and implementing strategy 	<p>LEADERSHIP</p> <ul style="list-style-type: none"> Emotional intelligence Talent advocacy Managing and leading change Action planning 	
WELCOME RECEPTION AND TEAM BUILDING ACTIVITY	DINNER AT THE FLUNO CENTER	DINNER AT THE FLUNO CENTER	CELEBRATION DINNER OFF SITE	DEPARTURE

Meet the Faculty

The proposed faculty for the Management Education programs were selected to provide a solid framework for future success in strategically managing, developing, and leading an organization. The faculty for any given session may vary, however, based on program needs and faculty availability.



Steve King, MA

Retired Executive Director

Center for Professional and Executive Development, Wisconsin School of Business

Steve is the retired executive director of the Center for Professional and Executive Development at the Wisconsin School of Business. Prior to his time with the university Steve served as Center and as the vice president of talent management for Baxter. Steve also worked as senior vice president of human resources and as chief learning officer for Hewitt Associates. Steve's career includes having served as faculty head for leadership and change management for the Bank of Montreal's Institute for Learning. He has also held training and management development positions at CVS Caremark and BMO Harris Bank. Steve holds an MA degree from the University of Wisconsin and a BA degree from the University of Iowa, both in economics.



Jim Swanke Jr., MBA, CPCU, ALCM, ARM

Lecturer

Center for Professional and Executive Development, Wisconsin School of Business

Jim concentrates on financial and strategic planning issues, including risk financing design and evaluation, captive insurance company design, enterprise risk management, vendor selection/review, risk management organizational design, facultative reinsurance placements, and regulatory compliance. Currently, Jim is a director and risk management consultant at Willis Towers Watson and a trusted adviser to executives and clients on insurance and captive programs. He also serves as the global director of enterprise risk management for Willis Towers Watson. Jim wrote and edited Mergers & Acquisitions: A Workbook of Management Issues (Watson Wyatt); co-authored a report, "Public Officials Liability Insurance: Understanding the Market" (International City Management Association [ICMA]); and co-authored Port Risk Management Guidebook (U.S. Maritime Administration). Jim holds a BBA degree in risk management and insurance, personnel management, and marketing and an MBA degree in finance and risk management from the University of Wisconsin-Madison.



Dan Kelly, MA

Chief Financial Officer

American Family Insurance

Dan is chief financial officer/treasurer of American Family Insurance, a position he has held since 2011. Dan's accountabilities include Business & Workplace Services, Finance, Enterprise Risk Management, Internal Audit, Investments, and Reinsurance. Dan started his career at Arthur Andersen in Milwaukee as a staff auditor. He joined American Family as a financial analyst in 1987 in the Controller Division. He was promoted to accounting manager in 1993 and was named accounting director in 2000. In 2003, Dan moved to the Life/Health Division as product design director working in operations. Three years later, Dan returned to the Controller Division as financial analysis director. He was named vice president of Human Resources in 2007. Dan earned a bachelor's degree in business administration and an MBA from the University of Wisconsin-Madison. He is a certified public accountant and a former licensed insurance agent in Wisconsin, and he holds the Fellow, Life Management Institute and Associate, Customer Service designations.



Joan Schmit, Ph.D.

Professor

Wisconsin School of Business

Joan Schmit is the American Family Insurance Chair in Risk Management and Insurance in the Wisconsin School of Business at the University of Wisconsin-Madison, where she has been on the faculty since 1988. Schmit also serves as an affiliate faculty member in the Nelson Institute for Environmental Studies at the University of Wisconsin and in the insurance program at the University of St. Gallen in Switzerland. Her areas of expertise include insurance regulation, enterprise risk management, reputation risk, and microinsurance.



Kathy Blumenfeld, CPA

Adjunct Faculty

Center for Professional and Executive Development, Wisconsin School of Business

Kathy is a business leader with extensive experience in diverse areas of the financial services industry, business, and government. She is both a certified public accountant (CPA) and a project management professional. In 2016, Kathy was named vice president of special operations at TASC. Previously, she served as vice president of lending and payment security for CUNA Mutual Group, where she worked for 26 years in various progressively responsible positions. In the vice president role, she led lending insurance products and services, strategy development, and product management for a multiline insurance portfolio of over \$800 million. Before joining CUNA Mutual Group, Kathy was a CPA and an auditor with AMG/McGladrey and a legislative aide and intern for a U.S. senator, a Wisconsin governor, and a state senator. Kathy currently serves as a board member of Meriter Hospital and has authored three books.



Dan Kaiser, JD, MS, BBA

Adjunct Faculty

Center for Professional and Executive Development, Wisconsin School of Business

Dan joined CUNA Mutual Group in 1992. He was promoted to senior vice president, product innovation and development in 2016 and leads a new business division established to innovate and launch entirely new businesses and product designs. Dan's experience includes senior executive role over a business earning \$850 million+ of annual revenue; adjunct professor; charity founder; and Wisconsin licensed attorney. His roles at CUNA Mutual Group involved leading a major business division, strategy development, product management, sales management, marketing, legal, and project management. He has also been a frequent speaker at national events; an author of articles in both business and legal journals; a director on multiple boards; an active community volunteer; and "chief farmer" of a Wisconsin-based organic farming charitable organization. Dan earned three degrees with honors (JD, MS, and BBA) and holds several professional certifications.



Tyler Leverty, Ph.D.

Associate Professor

Wisconsin School of Business

Ty Leverty is the Gerald D. Stephens CPCU Distinguished Chair in Risk Management and Insurance and an Associate Professor in the Department of Risk and Insurance at the Wisconsin School of Business. Prior to joining the faculty at UW-Madison, Leverty was an Associate Professor of Finance and the TRISTAR Risk Management Research Fellow at the University of Iowa's Tippie College of Business. His research interests are in the economics of insurance markets, insurance company operations, and public policy issues in insurance.



P. Artell Smith, MPA

Ad Hoc Instructor

Center for Professional and Executive Development, Wisconsin School of Business

Artell has extensive experience in human resources management, advising and focusing on overall people strategy, talent management/development, and compensation/benefits. He has led transformative projects across all aspects of human resources (HR) work globally, including talent development, generalist services, operations, technology, and global sourcing. Artell is principal and managing director of WatchWorks Management Consulting, LLC. Previously, he was HR senior vice president for strategy, technology and operations at Aon plc, a \$12 billion, global insurance brokerage and HR consultancy. Artell also served as CHRO at Aon Hewitt, a 25,000-employee, \$4 billion subsidiary of Aon plc. He retired from Aon plc in 2013. Artell's professional experience also includes having worked as HR vice president, business process outsourcing at Hewitt Associates; vice president of training and communications at Fidelity Investments, Retail Investor Services; and senior HR specialist at ExxonMobil. Artell earned a Master of Public Administration degree from Brigham Young University (BYU) Graduate School of Management and a Bachelor of Arts degree in history and political science, also from BYU.

World-Class Facilities

The Management Education program will be held at the University of Wisconsin's state-of-the-art Fluno Center, located in the heart of Madison.

Designed to feature an atmosphere conducive to creativity and collaborative learning, the Fluno Center includes:

- Four classrooms
- Eight breakout rooms
- Three case-study rooms
- 100 executive guest rooms
- A business center
- A study pub
- A fitness center
- An executive dining room

Guest Accommodations

Enjoy convenient and comfortable overnight accommodations at the Fluno Center for a reduced rate, which includes:

- Complimentary wireless Internet access in all guest and public areas
- Underground parking with spaces reserved for all Fluno Center guests
- In-room dining menu available every day from 5:00 to 10:00 p.m.
- Valet laundry service, safe-deposit boxes, and transportation arrangements available at the front desk



To make reservations at the Fluno Center, call Stephanie Achten at (608) 441-7312 and mention The Institutes' Management Education.

Go to TheInstitutes.org/ManagementEd to register today!





“ *The Institutes’ Management Education program is the most valuable and relevant education program I have ever attended in my industry.* ”

ANDREA VIGLASI

Territory Lead Underwriter & Underwriting Specialist
Western World Insurance Group

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