

# Claims Education

INTERNATIONAL INSURANCE INSTITUTE *e*magazine

## TRAINING || TALK

Greetings Claims Education Magazine readers. We hope that all of you are enjoying these last few weeks of summer before we head into my favorite season – Football season! In this issue our featured story is about the return of the Claims Education Conference. Due to the pandemic, we had to cancel both our 2020 and 2021 Claims Education Conferences. We were happy to be able to get together in person for our 2022 Claims Education Conference held May 10-13 at the Hilton New Orleans Riverside. It was uplifting to reconnect with old friends and make new ones as well. It certainly has been a difficult couple of years and we were grateful to be able to network, learn and share ideas, in person, once again. In case you missed it this year, our 2023 Claims Education Conference will be held May 2-5, at the Hilton New Orleans Riverside. As an added bonus, the second weekend of the world-famous New Orleans Jazz Fest takes place the weekend right after our conference, so come for the claims training, and stay for the Jazz!

As always, International Insurance Institute welcomes your contributions to the CEM and we encourage you to contact Lisa Ferrier at [lisa@insuranceinstitute.com](mailto:lisa@insuranceinstitute.com) for any input. Please feel free to direct any questions, feedback, articles, claims success stories, and/ or even topics that you would like to see discussed in the magazine. ■



**Carl Van**  
President and  
CEO International Insurance Institute

## FEATURE || STORY

# SUCCESSFUL CLAIMS EDUCATION CONFERENCE HELD IN NEW ORLEANS

Claims professionals and their guests gathered for the 17th Annual Claims Education Conference held in New Orleans May 10-13 at the Hilton New Orleans Riverside. Presented by the American Educational Institute (AEI), the International Insurance Institute, Inc. and the Society of Claim Law Associates, this is the 4th year the conference was held in the Big Easy.



Jessica Lederman, Katrina Atchley Arbogast, Lori Villegas,  
Becky Vallari, and Candice Tibesar of Great West Casualty



*Bob Cretel of Auto Club Enterprises (AAA) participates in Carl Van's session*



*Carl Van teaching Policy Interpretation*



*Dave Vanderpan encouraging participation in the Negotiation Skills session*



*Matt Hawk of Inspection Connection, LLC teaching Best Practices for Total Loss Handling*



*Rosemary Ward-Steele and Derek Thompson of Berkley Industrial Comp in the Negotiation Skills Session*

The conference featured three educational tracks: Soft-Skills, Manager and Technical, some of which were approved for continuing education credits.

The soft skills and manager tracks were presented by International Insurance Institute's training staff: Carl Van, President and CEO; Dave Vanderpan, Director of Claims Training; and Teresa Headrick, Director of Course Development. In addition, there were some guest speakers for the soft skills and manager track sessions: *Best Practices for Total Loss Handling* presented by Matt Hawk, Director of Specialty Operations, Inspection Connection, LLC; *Vehicle Investigation and Recovery* presented by Tim Herndon, COO, Herndon & Associates; and *Creating Effective Claims Education Solutions* presented by Jon Medel, National VP, Northbridge Insurance. Other soft-skills and manager track sessions included:

- Negotiation Skills: Presenting Settlement Figures the Right Way
- Employee Performance Issues: Identifying issues and responding appropriately
- Team Building Games
- Policy Interpretation
- Agents as our Partners
- Motivational Skills: One Size Fits One
- Loss Prevention in the Restaurant Industry
- 5 Standards of Great Claims
- Tips for Free Training
- Getting the Customer Service Scores You Deserve



*Tim Herndon, COO of Herndon & Associates discusses vehicle fire losses*

The entire technical track was approved for continuing education credit. Presenters were industry experts and nationally recognized insurance defense attorneys including David Alfini, Esq., Partner, Hinshaw & Culbertson, LLP; James T. Busenlener, Esq., Partner, Matthiesen, Wickert & Lehrer, S.C.; Brett Carey, Esq., Partner, RumbergerKirk; Sam Crowley, Esq., Associate, Hinshaw & Culbertson, LLP; Jarred Dichek, Esq., Equity Partner, Kubicki Draper; Emily Faith, Esq., Litigation Manager, DONAN; Ken Oliver, Esq., Equity Partner, Kubicki Draper, Matt Sekits, Esq., Shareholder-in-Charge, Seattle Office, Bullivant Houser Bailey and Nicholas Zotti, Esq., Sr. Associate Attorney, Matthiesen, Wickert & Lehrer, S.C.

The following technical topics were featured this year:

- Breaking Down Bad Faith: Insurers' Good Faith Duties and Defusing Plaintiff Perceptions
- Ethics for Insurance Professionals
- Social Media in the Evaluation of Insurance Claims
- The Daubert Challenge: Lessons Learned from Fighting the Motion to Exclude
- Panning for Subrogation Gold: How to recognize and pursue valuable subrogation claims
- Duty to Defend Broader than the Duty to Indemnify
- The Tender Trap Tips and strategies for dealing with tenders of defense and risk transfer
- Tips for Success from Insurance Claims Industry Leaders – Roundtable Discussion



*Participants enjoyed various activities in Dave Vanderpan's session, Team Building Games*





*Teresa Headrick motivating managers in the One Size Fits One breakout session*



*Sam Crowley, Esq., Associate and David Alfini, Esq., Partner of Hinshaw & Culbertson, LLP teaching Ethics for Insurance Professionals*



*Debra Vasek and Scott Spence of Texas Municipal League Intergovernmental Risk Pool enjoy a bloody mary*



*Sarah Udell of Apollo MGA and Ken Oliver of Kubicki Draper test out the Bloody Mary Bar*



*The chef flambés bananas for Bananas Foster*



*Claire Muselman takes the stage at the Claims Education Conference*

Wednesday's buffet lunch featured a special guest speaker, Dr. Claire Muselman of Emory Industrial. She taught the group how to appreciate the importance of our words and interactions during the claims process and how showing compassion is possible while still being highly effective. She closed out her presentation with an emotional video; there wasn't a dry eye in the house.



*Brad Schram of Latitude Subrogation Services applauds Claire's presentation*



*Lyn Scrivner and Tonya Reynolds of Shelter Insurance chat with Claire Muselman after her presentation*



*Shawn Phillips, SCLA Silver the 2021 Distinguished SCLA Award Winner with his manager, Todd Davis, VP SIU Operations at Allied Universal.*

Claims professionals who between January 1, 2019 and April 10, 2022 earned an AEI designation were recognized at the Designation Conferment Ceremony on Wednesday, May 11th at the Claims Education Conference. During the ceremony the 2021 Distinguished SCLA Award Winner, Shawn Phillips, SCLA Silver was honored. Shawn is the Assistant Vice President and founding Director of the Special Investigations - Major Case Unit with Allied Universal Compliance and Investigations and he spoke to the group about his experience with his AEI coursework. "Utilizing the knowledge I gained from my AEI coursework, combined with over 25 years of investigative experience, I have formulated an analytical intelligence-driven focus to insurance investigations. I utilize a unique blend of investigative edu-



*Shawn Phillips, SCLA Silver celebrating his award with his wonderful family; wife Heather & daughter Peyton*

cation and experience rooted in forensic science for seeking the truth and providing evidence-based answers to assist vendor partners, insureds and claimants. My AEI education has assisted me in building a team that consistently delivers results by identifying fraudulent claims and protecting insurers and insureds from the impact of millions of dollars of loss annually," according to Shawn. Shawn earned his SCLA Silver and is also a Certified Fraud Examiner, Certified Insurance Fraud Investigator, Certified Financial Crimes Investigator, Certified Economic Crimes Forensic Examiner, Certified Fire Investigator with Motor Vehicle endorsement, and Certified International Post-Blast Investigator. Currently, he is a board member for the Mid-South Chapter of the Association of Fraud Examiners. He lectures nationally/internationally in complex financial fraud schemes, fire/explosion forensic analysis, arson for profit schemes, and medicolegal death investigations.

The Society of Claim Law Associates would like to congratulate Shawn again on his accomplishment and recognize all of the hard work and dedication to all of the designees honored at the 2022 Designation Conferment. Your commitment to claims law education is second to none.



SAVE  
THE DATE  
2023

# CLAIMS EDUCATION CONFERENCE

*Presented by*

American Educational Institute, International Insurance Institute  
and Society of Claim Law Associates



May 2 - 5, 2023

Hilton New Orleans Riverside

[Claimseducationconference.net](http://Claimseducationconference.net)

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*Laura Stengl, SCLA President and Lisa Schorfheide of Berkley Environmental cool off with some ice cream*



*Christal Beard of Kentucky Farm Bureau shows off her daiquiri for the camera*



*Kathleen McElwain and Jennie Younkin of the State of Montana Risk Management try the King Cake, a classic New Orleans treat*



*Daniel Patterson, Ryan Montilliano and Ryan Almiranez of First Insurance Company of Hawaii at the AEI Designation Conferment Ceremony*

Wednesday afternoon featured the AEI Designation Conferment where over 30 designees received their awards as friends and family looked on. Shawn Phillips was the winner of this year's Distinguished SCLA Award.



*Jacob Burgess of Central Mutual Insurance and his guest Kayrin Burgess at the AEI Designation Conferment Ceremony*



*Shawn Phillips and Todd Davis of Allied Universal*



*Doug Stokes of Erie Insurance and Laura Stengl, SCLA President*



*Kristl and Daniel Patterson at the AEI Designation Conferment Ceremony*



*Sarah Hudson of USAA; Laura Stengl, SCLA President; Distinguished SCLA Award Winner Shawn Phillips; Kathy Crane of University of Oklahoma; and Corinn McBride of American Educational Institute.*



*Alice Curley of Utica National Insurance Group and her guest, Jake Cote*



*Jonathan Jones of Utica National Insurance Group and his guest, Roberto Beltran*



*Participants enjoyed cooking a New Orleans style meal at the New Orleans School of Cooking*



*A haunted cemetery stop during the Ghost Tour*



*One of the beautiful cocktails served at Emeril's*



*The tour guide for the haunted ghost tour dressed the part*

Among the classroom learning and the celebration of new designees, there was also time for venturing out and experiencing all that New Orleans has to offer. On Wednesday evening of the conference, there was a group dinner at Emeril's in the Warehouse District.

On Thursday afternoon, guests of the conference could choose to sign up for one of the organized activity offerings. Activities offered included an Airboat tour in the swamps of Louisiana, a walking tour of the Garden District, cooking (and eating!) at the New Orleans School of Cooking, and an electric bicycle tour of New Orleans. There was also an evening dinner jazz cruise, and for a few brave souls, a bus tour to some of the most haunted spots in New Orleans. On Friday afternoon a few attendees were able to take an afternoon tour of Oak Alley Plantation.

It was nice to finally be back together in person and attendees took advantage of the networking offered in the exhibit hall and during the conference. We'd like to thank all of our exhibitors from the 17th Annual Claims Education Conference:

American Educational Institute  
Denise W. Wrenn and Associates  
DONAN  
Grindley Williams Engineering  
InspectionConnection  
International Insurance Institute, Inc.  
Kubicki Draper  
Latitude Subrogation Services  
Matthiesen, Wickert and Lehrer, S.C.  
Sedgwick



*Lea Hacker of Federated Mutual Insurance Company and her guest, Donald Hacker*



*Ramy Ng and Deborah Robinson of Island Insurance*



*Katherine Ropp, Morgan Woll, Dale Sabo and Todd Ulrich of Erie Insurance in the exhibit hall*



*Stacey Glick and Dan Sanders of Grindley Williams chat with Jeremy Catlin of Hiscox*



*Sarah Udell, Tiffany Floyd and Teresa Euziere of Apollo MGA in the exhibit hall*



*Denise Wrenn and Barbara Gaynor of Denise W. Wrenn and Associates sign Hope Remetta's exhibitor prize drawing card*



*Jon Coscia and Jim Wilds of Latitude Subrogation Services*



*Beth Crosa of Peter J. Crosa & Co. and her guest, Brian Burns*



*Ben Ebling of Latitude Subrogation Services talks with Scott Spence and Debra Vasek of Texas Municipal League Intergovernmental Risk Pool*



*Jamie Breen of Matthiesen, Wickert & Lehrer, S.C. chats with Samantha Zamora and Valentina Ramirez of Tower Hill Insurance*



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[www.inspectionconnectionclaims.com](http://www.inspectionconnectionclaims.com)

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AEI Booth



Terrence Nowak of Markel Service, Incorporated listens intently during a breakout session



Carl Van



Kevin Woolfolk of Wilber Group enjoying the lunch presentation



Dale Sabo of Erie Insurance picks up a daiquiri to share



Mike Kallfelz of Wayne Cooperative Insurance visits the DONAN booth



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