

# Claims Education

INTERNATIONAL INSURANCE INSTITUTE *e*magazine

## TRAINING || TALK

In this issue we feature a story highlighting the 2019 Claims Education Conference held May 14-17, in New Orleans. Check out the photos and see if you recognize any of the attendees. In addition to all of the training that took place, we had a lot of fun and indulged in both a Bloody Mary Bar and two daiquiri machines this year. After you read the article and see the photos, we are certain you will want to register for 2020, so we are now accepting registrations for the Claims Education Conference. Our first early bird deadline is coming up on November 30th.

This issue also features an article from our friend and industry expert, D. Diann Cohen, VP of Macro-Pro, Inc. She discusses the importance of making sure employees fine-tune their soft skills along with the hard skills.

Our Feature Course section showcases Awesome Claims Customer Service: The Next Level. This workshop takes our most popular course to, well, the next level and cements the importance of training employees on their soft skills.

As always, we here at International Insurance Institute welcome your contributions to CEM and encourage you to contact Karla Alcerro at [karla@insuranceinstitute.com](mailto:karla@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

# BIG FUN IN THE BIG EASY

## 14th Annual Claims Education Conference Held in New Orleans

Over 200 claims professionals and their guests gathered for the 14th Annual Claims Education Conference held in New Orleans May 14-17 at the Hilton New Orleans Riverside. Presented by the American Educational Institute, the International Insurance Institute, Inc. and the Society of Claim Law Associates, this is the 3rd year the conference was held in the Crescent City.



Jennifer Maylone, Kendra Jackson, Dan Sullivan, Cody Drake  
and Lauren Parker from Homesite Insurance Company

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 Inter-

## FEATURE || STORY

national 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 two bonus manager track sessions: *Demystifying the Catch Phrases of AI, Deep Learning and Machine Learning*, presented by Christopher Hart, Sr. Director of Business Intelligence and Strategic Initiatives, Copart, Inc. and *5 Essential Factors Every Manager Needs to Know About Fulfilling Requests for Copies of Claim Files* presented by Fig Annunziato, CEO of ClaimFox. Other soft-skills and manager track sessions included:

- Awesome Claims Customer Service:  
Dealing with Difficult Customers
- Gaining Customer Trust:  
Ending the Question after Question Cycle
- StrengthsFinder 2.0
- Increasing Settlement Figures During Negotiations
- Planning and Prioritizing: Time Management Tips
- Loss Prevention in the Restaurant Industry
- Getting Customers to Listen
- Driving Up Customer Retention
- Interviewing and Hiring Great Claims People
- Business Writing Skills



*Jennifer Wood of Erie Insurance graciously volunteers during class with Dave Vanderpan*



*Alysa Corona of BrickStreet Insurance takes notes during Teresa Headrick's StrengthsFinder 2.0 session*



*Left: Teresa Headrick, Director of Course Development at International Institute, Inc. shares her top 5 strengths in the StrengthsFinder 2.0 course.*



*Right: Maggie Sanders, Esq., Associate, Rumberger, Kirk and Caldwell discusses first party claims handling.*

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.; Emily Faith, Esq., Litigation Services Manager, DONAN; Duncan K. Fobes, Esq., Principal, Patterson, Buchanan, Fobes & Leitch; Darryl Gavin, Esq., Partner, Rumberger, Kirk and Caldwell; Sara Huffman, Esq., Associate, Matthiesen, Wickert & Lehrer, S.C.; Bryan Kelley, SCLA, Territorial Claim Leader, Allstate Business Insurance; Charles Lind, Esq., Attorney, Patterson, Buchanan, Fobes & Leitch; Jackie Mitchson, Esq., Associate, Bullivant Houser Bailey, P.C.; Maggie Sanders, Esq., Associate, Rumberger, Kirk and Caldwell. The following technical topics were featured this year:

- Successful Management of Commercial Motor Vehicle Accident Litigation: An Insider's Perspective
- First Party Claims Handling and Insurer Bad Faith



*John Morrison of Security First Insurance and Russel Beers of WSCC Water discuss their ideas in the Dealing with Difficult Customers session.*



*Marilyn O'Brien of Allstate Insurance orders up a Bloody Mary at the Bloody Mary bar sponsored by ClaimFox.*



*Maggie Jaltorassian samples the daiquiris sponsored by Latitude Subrogation Services. This year's conference featured two flavors of daiquiris – Strawberry and Margarita.*

- Ethics for Insurance Professionals
- Handling a Claim in Anticipation of Litigation
- Inventive and Effective Strategies for Settlement of Small Claims
- Now I Get It: Understanding Insured Contracts under a CGL
- Employment Law Update

- Tips for Success from Insurance Claims Industry Leaders – Roundtable Discussion

Participants enjoyed the extras at this year's Claims Education Conference including a full Bloody Mary bar complete with all of the fixings like pickled okra and beans, olives and tabasco sauce and two flavors of daiquiris to choose from during breaks and lunch.



*Left: Kim Sport talks about Breastoration, a non-profit organization based in New Orleans. Right: Ann and Carl Van of International Insurance Institute with Kim Sport founder of Breastoration.*

Wednesday's buffet lunch featured a special guest speaker, Kim Sport, founder of Breastoration, a 501c3 non-profit organization which helps breast cancer patients access reconstructive surgery after mastectomies. Kim gave an emotional and moving talk about the importance of providing women with the resources needed to heal after experiencing breast cancer. Since nearly all of us are affected by cancer, it was an inspiring speech and many exhibitors were motivated to donate to the organization. Carl and Ann Van of International Insurance Institute, Inc. matched all donations for a total of over \$5,000 in donations to Breastoration.

Wednesday afternoon featured the AEI Designation Conferment ceremony where over 37 designees received their awards as friends and family looked on. Claire Muselman, Director of Workers Compensation for Continental Western Group was the Distinguished SCLA Award winner; her positive energy was contagious as she lit up the room during her speech. It was inspiring when Claire announced that she was donating her \$500 prize to Breastoration.



*Left: Claire Muselman speaking to the group of designees.*



*Right: Melissa Studeny, President of the SCLA congratulates Dexter Williams of Liberty Mutual on his newly earned designation.*



*The hard-working group at New Orleans School of Cooking enjoying the fruits of their labor.*

Among the classroom learning and the celebration of new designees, there was also time for venturing out and experiencing all that the city has to offer. New Orleans remains an authentic destination and truly a place like no other. It's a city of chefs and delectable cuisine and a unique blend of French, Spanish, Caribbean and African cultural influences in the architecture, food, people and music. Attendees of the conference took full advantage of all that this unique city has to offer.



*Carla Donegan, an exhibitor from Lombardi Associates, signs Seema Pandey's card for the prize drawing.*



*The Chef's Table at Emeril's Restaurant*

On Wednesday evening of the conference, most of the conference goers joined the group dinner held at Emeril Lagasse's flagship restaurant. They dined on barbecued shrimp, andouille crusted gulf drum, and grilled filet. Those who were able to save room for dessert indulged in Emeril's famous banana cream pie slices that were larger than life.

On Thursday afternoon, attendees could choose to sign up for one of the organized activity offerings. Activities offered



*Barbara Molina, Michelle Erimez, Fig Annunziato, Amanda Cortes and Jim Richardt of ClaimFox.*

included a private tour of the WWII Museum, 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 a visit to the famous Mardi Gras World, where



Ben Ebling, Brad Schram, Jon Coscia and Adam McIntosh from Latitude Subrogation Services.



Ben Miller of Vanliner talks with Ben Ebling of Latitude Subrogation Services.



Jess White and Emily Faith, JD at the DONAN booth.

Mardi Gras floats are stored. There was also an evening dinner jazz cruise, and for a few brave souls, a visit to Bloody Mary's Haunted Museum for a live séance.

The Claims Education Conference is grateful for the support of our exhibitors and sponsors. In particular, we'd like to thank our Diamond Sponsor, Latitude Subrogation Services and our Gold sponsors, ClaimFox and Copart, Inc. Without their support, the conference wouldn't be able to offer so many of the fun extras like daiquiris and fresh popcorn in the exhibit hall.



The Three Chris' of Copart – Christopher Hart, Chris Pinson and Chris Coniglio in the exhibit hall.



Jamie Breen at the Matthiesen, Wickert & Lehrer, S.C. booth.

**EXHIBITORS OF THE  
2019 CLAIMS EDUCATION CONFERENCE**

- American Educational Institute/SCLA
- ClaimFox
- Copart
- DCI Solution
- DONAN
- Florida Institute for Neurologic Rehabilitation
- I-CAR
- International Insurance Institute, Inc.
- Latitude Subrogation Services
- Lombardi Associates
- Matthiesen, Wickert and Lehrer, S.C.
- Sedgwick

We would also like to recognize and congratulate all of the new American Educational Institute designees who attended the conference. We enjoyed celebrating with you!

***SPECIALIST DESIGNATION***

**AVANT SPECIALTY CLAIMS**

Ryan Carver, Legal Principles Claim Specialist (LPCS)

**WASHINGTON SCHOOLS RISK MANAGEMENT POOL**

Seema Pandey, Legal Principles Claim Specialist (LPCS)

***ASSOCIATE DESIGNATION***

**AMERICAN FAMILY INSURANCE**

Karen Fine, Property Claim Law Associate (PCLA)

**ERIE INSURANCE**

Joseph Vahey, Fraud Claim Law Associate (FCLA)

***SENIOR CLAIM LAW ASSOCIATE (SCLA)***

**CONTINENTAL WESTERN GROUP**

Claire Muselman

**ERIE INSURANCE**

Jarod Clayberg

Brii Gerrard

Dale Sabo

Todd Ulrich

**FEDERATED MUTUAL INSURANCE COMPANY**

Latasha Brown

Deborah Willits

**FIRST INSURANCE COMPANY OF HAWAII**

Adriana Cuadros

Alton Porlas

Nicole Umeno

Marlene Vigil-Wery

**GREAT WEST CASUALTY COMPANY**

Cathy Krane

**KENTUCKY FARM BUREAU MUTUAL**

Angela Benningfield

Tommy Buford

Bo Hedrick

Tena Springfield

Sonya Vincent

**LIBERTY MUTUAL INSURANCE**

Dexter Williams

**MARKEL SERVICES, INCORPORATED**

Casey Matthews

**NATIONAL INDEMNITY COMPANY**

Jeffrey Bowerman

Zachary Howe

**PEMCO**

Dylhan Matlock



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Katherine Thibault

**WASHINGTON SCHOOLS RISK MANAGEMENT POOL**

Nancy Nichols

**SCLA SILVER AWARD**

**CONTINENTAL WESTERN GROUP**

Claire Muselman

**ERIE INSURANCE**

Dale Sabo

**FIRST INSURANCE COMPANY OF HAWAII**

Nicole Umeno

Marlene Vigil-Wery

**NATIONAL INDEMNITY COMPANY**

Jeffrey Bowerman

**UTICA NATIONAL INSURANCE**

Erin Brady

Andrew Owen

Tracy Richter

**WASHINGTON SCHOOLS RISK MANAGEMENT POOL**

Lisa Dubose Day

Nancy Nichols

**SCLA GOLD AWARD**

**CONTINENTAL WESTERN GROUP**

Claire Muselman

**ERIE INSURANCE**

Dale Sabo

**FIRST INSURANCE COMPANY OF HAWAII**

Nicole Umeno

Marlene Vigil-Wery

**UTICA NATIONAL INSURANCE**

Tracy Richter

**WASHINGTON SCHOOLS RISK MANAGEMENT POOL**

Lisa Dubose Day

Nancy Nichols

The 15th Annual Claims Education Conference is set for May 12-15, 2020 in New Orleans. Visit [claimseducationconference.net](https://claimseducationconference.net) for the latest information. We hope to see you there! ■



*Laura Stengl and Claire Muselman*