

# IMPROVE

## FALL 2012

Westin Kierland, Scottsdale  
October 16-19th

Will you  
catch or miss  
the wave?

### AGENDA AT A GLANCE

	GROUP A	GROUP B
<b>TUESDAY EVENTS</b>		
11:30A—1:00P	Lunch	
1:00P—5:00P	Strategic Issues Groups	
6:00P	Offsite SIG Dinners	
<b>WEDNESDAY EVENTS</b>		
7:00A—8:00A	Breakfast	
8:00A—11:00A	Strategic Issues Groups	
11:15A—11:45A	Welcome Presentation	Welcome Presentation
11:45A—12:15P	Lunch	Lunch
12:30P—1:45P	State of the Industry	State of the Industry
2:00P—5:15P	Educational Breakout Sessions	Strategic Issues Groups
5:30P—8:30P	Networking Reception	Networking Reception
<b>THURSDAY EVENTS</b>		
6:30A—7:00A	Fun Run/Walk	Fun Run/Walk
7:15A—7:45A	Breakfast	Breakfast
7:45A—9:00A	The State of the Economic Cycle	The State of the Economic Cycle
9:00A—9:45A	Healthcare Reform Update	Healthcare Reform Update
10:00A—12:30P	Strategic Issues Groups	Educational Breakout Sessions
12:30P—1:30P	Lunch & Advisory Council	Lunch & Advisory Council
1:45P—5:45P	-12:30P ADJOURNED-	Strategic Issues Groups
6:30P		Offsite SIG Dinners
<b>FRIDAY EVENTS</b>		
7:30A—8:15A		Breakfast
8:15A—11:30A		Strategic Issues Groups -11:30A ADJOURNED-

## GROUP A AGENDA

Tuesday 10/16-Thursday 10/18  
Westin Kierland— Scottsdale, AZ

To Register:

[www.MarshBerry.com/IMPROVEfall2012](http://www.MarshBerry.com/IMPROVEfall2012)

Hotel:

Westin Kierland  
6902 East Greenway Parkway  
Scottsdale, AZ 85254  
(480-624-1000)

Questions: Please contact Jessica Stogran, 440-392-6558 or  
[Jessica.Stogran@MarshBerry.com](mailto:Jessica.Stogran@MarshBerry.com)



### TUESDAY 10/16/2012

11:30am - 1:00pm Lunch

1:00pm - 5:00pm **Group A Strategic Issues Group Sessions**

The Strategic Issues Group (SIG) Session can be described as an outside “board of advisors”. Each APPEX Partner is assigned to a SIG with up to 9 non-competing agencies and 2 facilitators. Agency owners who participate in the SIG share operating strategies in order to expand thinking, break paradigms and maximize learning from each other. The SIG is a “think tank” group, which is strategic in orientation and serves as a core peer group within which information can be exchanged, accountability implemented and improvement mandated.

6:30pm **Group A Offsite SIG Dinners (Optional)**

### WEDNESDAY 10/17/2012

7:00am - 8:00am Breakfast

8:00am - 11:00am **Group A Strategic Issues Group Sessions**

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## WEDNESDAY 10/17/2012, con't

11:15 am - 11:45 am

### **APPEX Welcome Presentation and Awards**

This session will kick off the spring summit by providing an overview of the membership, introducing new members, and discuss recent network developments. We will also illustrate best practices and recognize high performers among the APPEX Partnership.

11:45 am - 12:15 pm

### **Lunch**

12:30pm - 1:45 pm

### **State of the Industry**

*John Wepler, President, MarshBerry*

A tidal wave of uncertainty regarding the future has all of corporate America concerned and asking "Is a double dip recession on the horizon?". From market pressures to organic growth, there are just too many specters on the horizon. So, why not focus on what you can control – the performance of your agency. Remaining professional, holding employees accountable and focusing on growth is where the top performers surf the wave of success.

One of the first places to start on this path is with corporate governance. While embracing this "new way of thinking" may be a paradigm shift for most, execution and implementation are critical. Corporate governance within an agency can vary greatly; however, having an effective corporate governance structure can help an organization achieve its corporate objectives as well as differentiate the organization from competition. For example, an agency with a strong corporate governance culture can also enhance the reputation of the organization and make it more attractive to customers and perpetuation candidates.

The upcoming State of the Industry presentation will address how to use corporate governance to drive professionalism, accountability, transparency, growth and differentiation. The corporate governance survey taken by all attendees will be presented and analyzed along with market trends and MarshBerry's vision for the future. All attendees will receive a detailed report of the best practices of corporate governance that will correlate structure with agency performance. Likewise, the Strategic Issues Groups (SIGs) will use the corporate governance survey as a tool for discussion and implementation of best practices.

2:00pm - 3:15pm

### **Educational Breakout Sessions:**

#### **EBS #1: iPad For Business**

Presented by: Mike Natalizio, HNI and James Carlson, Bucket Brigade

The iPad isn't just a "cool" device, it's an effective tool for making sales... advancing your brand... and becoming more effective. Whether you are a current iPad owner or just thinking about purchasing one, this session will go over best practices for using it in your everyday work.

One valuable use of this iPad is in sales. The brochures and slide decks that used to be staples in every salesperson's toolbox are now obsolete. Why waste paper and bring clutter into a prospect's office when demonstrations on your tablet are much more effective?

Beyond its use in sales, the iPad can help you be more efficient in many areas of daily business operations. Apps like Googlevoice can store your contact information and even transcribe voicemails into text. Adobe Ideas are great for drawing out meeting notes on the fly. Flipboard makes it easy to stay on top of the social media buzz. Come learn how to make the most of this tool in your work!

3:30pm - 4:45pm

### **Educational Breakout Sessions, Please select one:**

#### **EBS #2: Cultivating Your Leadership Brand**

Kathy Ryan, Pinnacle Coaching Group and Author "You Have to Say the Words"

Do your leaders embody and deliver on the promises you make to your customers? Your ability to translate customer expectations into employee behavior is fundamental to your success. Bottom line, your people are your brand. Good leaders do not just focus on building their personal credibility and reputation; they are also committed to developing the leadership capabilities of their organizations. Your leadership brand should reflect the style, culture, assets and strategies of your organization. A strong leadership brand, connected to your agency's marketing brand, will set you apart and differentiate you in the marketplace.

#### **EBS #3: Face to Face Selling-- The Forgotten Skill**

Tim Parenti, FIRST Insurance Funding

Have you ever noticed how certain sales people have an uncanny ability to "connect" with prospects better than others? They seem to "get along" in such an effortless way that it's almost impossible to isolate what they're doing differently. Tim will be unearthing the secrets behind this connection in his breakout entitled – "Face To Face Selling – The Forgotten Skill".

His presentation will explore the finer nuances of the sales conversation and how you can key in on opportunities (cues) to develop "stealth rapport" with your client and/or prospect to help move the sales conversation forward. Starting with the basic understanding of Positive & Negative Body Language, Tim will drill deep into the unique components of our neurology and physiology that affect how people respond - both consciously and unconsciously – when information is shared during any communication opportunity.

5:30pm - 8:30pm

### **APPEX Networking Reception**

Join us for cocktails, hors d'oeuvres, and a final networking opportunity. Following the reception use this evening to enjoy the sights, sounds and tastes of Scottsdale.

## THURSDAY 10/18/2012

6:30am - 7:00am

### **MarshBerry Fun Run/Walk**

Exercise is proven to boost brain power by increasing the blood flow to the brain, bringing it glucose for energy and oxygen to soak up toxic electrons that are left over. It also stimulates the protein that keeps the neurons connecting. Join us for a 3 mile fun run/walk to boost your brain power.

7:15am - 7:45am

### **Breakfast**

7:45am - 9:00am

### **The Present State of the Economic Cycle: How it Affects Your Bank and Therefore Your Business**

*Ed Wehmer, Wintrust Financial Corporation*

The health of the insurance environment is heavily influenced by many factors including the financial markets, the regulatory environment and the world economy. To anticipate future changes in the insurance industry and formulate value enhancing strategies, it is critical to understand the past and the present economic and regulatory environments. During this session, Ed Wehmer, Founder and CEO of Wintrust Financial Corporation will provide a detailed perspective on how interest rates, sovereign debt, currency fluctuations and the production output of the largest nations in the world are influencing the banking industry, the insurance industry, your company and community.

Sponsored By:



9:00am - 9:45am

### **Compliance & the Affordable Care Act—10 Things Brokers Should Be Discussing With Their Clients Now**

*Presented by Peter Marathas, Employee Benefits and Executive Compensation Partner, Proskauer*

As passed, the Affordable Care Act filled 2,000 pages, and included over 1,000 instances of delegation to federal regulators to draft the rules. Since March 2010, the federal agencies have written approximately 15,000 pages of rules and they have only just begun. This all adds up to one big Compliance Headache for your clients. In this session we identify (i) 10 ACA compliance concerns brokers should be discussing with their clients, (ii) compliance solutions that keep you in the know and in the game, and (iii) how compliance is a source of business opportunity with clients of all sizes.

10:00am - 12:30pm

### **Group A Strategic Issues Group Sessions**

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12:30pm - 1:30pm

### **Advisory Council Lunch (Advisory Council Members Only)**

12:30pm - 1:30pm

### **Lunch**

12:30 pm

### **Group A Adjourned**

