



The Institutes'

# Business Strategy for Emerging Leaders

May 11 to 15, 2020

  
**The Institutes**®  
RISK & INSURANCE  
KNOWLEDGE GROUP

  
**WISCONSIN**  
SCHOOL OF BUSINESS  
UNIVERSITY OF WISCONSIN-MADISON  
TOGETHER FORWARD®

CENTER FOR  
PROFESSIONAL  
& EXECUTIVE  
DEVELOPMENT



## Here's what survey respondents had to say about the 2019 program:

**100%**

rated the overall program as **above average**.

**83%**

would **recommend this program** to a colleague.

**100%**

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

# Business Strategy for Emerging Risk and Insurance Leaders

In today's competitive and continuously changing business environment, directors and managers need a solid understanding of core business functions combined with real-world knowledge in order to effectively implement strategies throughout their organization. Brought to you in partnership with the Wisconsin School of Business Center for Professional & Executive Development, University of Wisconsin-Madison, The Institutes' Business Strategy for Emerging Leaders provides valuable organizational leadership training tailored to the risk management and property-casualty insurance industry.

By participating in the Business Strategy for Emerging Leaders 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

With more than 100 years of experience, The Institutes are the leading provider of risk management and property-casualty insurance education.

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; continuing education (CE) courses; and live events.



### Wisconsin School of Business Center for Professional & Executive Development

For decades, the risk management and insurance program at the Wisconsin School of Business has been recognized as one of the top 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 Center for Professional & Executive Development is committed to guiding and inspiring business leaders worldwide.



**When:** May 11 to 15, 2020

**Cost:** **Early-Bird Registration:** \$4,595 before March 31, 2020  
**Full Registration:** \$5,095  
**Registration Deadline:** April 24, 2020

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

**Contact:** For more information, contact Elisa Murray:  
(610) 251-2757 or [EmergingLeaders@TheInstitutes.org](mailto:EmergingLeaders@TheInstitutes.org)

## What to Expect

- A variety of interactive learning practices and discussions, real-world examples from the risk industry, and small learning team simulations
- A personal assessment tool that will help you improve as a leader and a team member through greater self-awareness and knowledge
- Networking opportunities with like-minded peers to grow and expand your business acumen

## Who Should Attend

The Business Strategy for Emerging Leaders program is designed for experienced, high-potential directors or managers 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 align and implement successful strategies within your organization
- Master 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
- Build your financial acumen with practical exercises
- Place the current and future state of the industry within the context of your own experiences

## How to Register

Go to [TheInstitutes.org/EmergingLeaders](http://TheInstitutes.org/EmergingLeaders) to register online, or call Customer Success at (800) 644-2101.

## Early-Bird Discount

Register for The Institutes' Business Strategy for Emerging Leaders before March 31, 2020, to take advantage of the early-bird price of \$4,595!

# World-Class Facilities

The Business Strategy for Emerging Leaders program will be held at the 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 to 10 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' Emerging Leaders.

# Business Strategy for Emerging Leaders Program Schedule

Program agenda is subject to change.

MONDAY May 11	TUESDAY May 12	WEDNESDAY May 13	THURSDAY May 14	FRIDAY May 15
ARRIVAL AND CHECK-IN 3:00 p.m.	INSURANCE INDUSTRY ACUMEN <ul style="list-style-type: none"> <li>Insurance company strategy</li> <li>Enterprise risk management (ERM) as framework for managing and leading</li> <li>General insurer performance metrics</li> </ul>	INSURANCE COMPANY STRATEGY <ul style="list-style-type: none"> <li>General strategic-thinking skills</li> <li>Understanding the competitive landscape</li> </ul>	LEADERSHIP <ul style="list-style-type: none"> <li>Employee engagement and culture</li> <li>Managing in the matrix</li> </ul>	LEADERSHIP <ul style="list-style-type: none"> <li>Foundational leadership styles</li> <li>Situational and strategic leadership styles</li> <li>Action planning</li> </ul>
	LUNCH	TEAM SIMULATION*	TEAM SIMULATION*	TEAM SIMULATION*
	DECISION-MAKING ANOMALIES and INSURER FINANCIAL STATEMENTS <ul style="list-style-type: none"> <li>Making decisions with financial data</li> <li>Relationship of financial statements to individual units within the insurer and overall ERM</li> </ul>	INSURANCE COMPANY STRATEGY <ul style="list-style-type: none"> <li>Evaluating the strengths and weaknesses of each participant's organization</li> <li>Aligning and implementing strategy</li> </ul>	LEADERSHIP <ul style="list-style-type: none"> <li>Emotional intelligence</li> <li>Talent advocacy</li> <li>Managing and leading change</li> <li>Action planning</li> </ul>	
WELCOME RECEPTION AND DINNER 6:30 p.m.	TEAM SIMULATION*	TEAM SIMULATION*	TEAM SIMULATION*	DEPART MADISON 12:15 p.m.
	DINNER	DINNER	OFF-SITE DINNER	

\*Team Simulation—Small groups that are formed into teams. Each team is responsible for product management within its own fictitious insurance company. Team members decide how to price their product, what underwriting standards to apply, how much of the premium to dedicate to the distribution channel, and how to structure the company's reinsurance program.

# Meet the Wisconsin Team

The proposed faculty for the Business Strategy for Emerging Leaders program was 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.



## **Dan Kaiser**

*Senior Vice President, Product Innovation and Development  
CUNA Mutual Group*

Dan leads a new business division established to innovate and launch entirely new businesses and product designs. 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.



## **Eric Hansing**

*Vice President, Multicultural and Corporate Strategy  
CUNA Mutual Group*

Eric leads corporate strategy development and is responsible for the annual business planning processes that ensure strategic initiatives align with long-term strategic and financial performance goals. He holds a bachelor’s degree in marketing from the University of Wisconsin–Whitewater and an executive master’s degree in business from the University of Wisconsin–Madison, and he is a certified Credit Union Development Educator.



## **P. Artell Smith**

*Vice President-Human Resources, Talent, HR Shared Services and Technology  
Quad/Graphics, Inc.*

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 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.



### **Jim Swanke Jr.**

*Director, Risk Consulting  
Willis Towers Watson*

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. He 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.



### **Steve King**

*Retired Executive Vice President, HR  
Aon Hewitt*

Steve is the retired executive director of the Center for Professional and Executive Development at the Wisconsin School of Business. Steve has 35 years' experience in teaching leaders how to optimize their own and their organizations performance. He holds an MA degree from the University of Wisconsin and a BA degree from the University of Iowa, both in economics.



### **Tyler Leverty, PhD**

*Associate Professor  
Gerald D. Stephens CPCU Distinguished Chair in Risk Management and Insurance  
Wisconsin School of Business*

Ty 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. Before 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.



### **Joan Schmit, PhD, MBA, CPCU**

*Professor  
American Family Insurance Distinguished Chair in Risk Management and Insurance  
Wisconsin School of Business, University of Wisconsin-Madison*

Joan is the American Family Insurance Distinguished Chair in Risk Management and Insurance in the Wisconsin School of Business at the University of Wisconsin-Madison. She also serves as an affiliate faculty member in the Nelson Institute for Environmental Studies at the University of Wisconsin, as chair of the Risk and Insurance Department in the Wisconsin School of Business, 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.

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