



# Chartered Insurance Operations Professional (CIOP) Designation Class

CLASS OF  
2010

## Designing, Building and Leading World Class Insurance Operations

**Operational Modeling  
and Analysis**

**Process Principals and  
New Design Techniques**

**Advancing Operational  
Performance thru Metrics**

**Technology Enabled High  
Performing Operations**

**Leveraging Human Capital  
for Sustainable Excellence**

**Managing Change -  
Planning and Mobilizing  
for Improved Insurance  
Operations**



Pathway  
to  
Excellence

**Professional Recognition for Insurance  
Industry Operational Leaders & Professionals**

**May 12 - 14, 2010**  
American Management Assoc.  
Executive Conference Center  
New York, New York

Earn your CIOP designation while mastering underlying business concepts and cutting edge techniques in reducing costs, improving service, and achieving profitable growth

# The Designation

## Pathway to Excellence

To further advance their organization's capabilities and performance, today's insurance leaders and professionals must be able to accomplish more than they have ever done before. They need to build operations that are nimble and resilient. They need to design and deploy innovative processes that not only reduce costs but clearly differentiate the business by delivering a consistent and compelling customer experience. New metrics are needed that are forward looking, point to root causes of performance opportunities, and better enable accurate and timely decisions – at all levels of the organization. They need to better identify and rapidly implement high impact technologies that truly re-invent, enable, and bring about new modes of doing business. Multiple projects must be more effectively managed and collectively coordinated. They must reposition and optimize the return on human capital while creating a business context that inspires people, reorients their thinking, eliminates entitlement and creates personal and organizational accountability. Above all else they need to master the underlying bodies of knowledge and emerging business techniques that serve to optimize these operational elements while continually forging higher degrees of alignment and integration among these elements.

The Chartered Insurance Operations Professional (CIOP) designation process helps provide a pathway for insurance industry leaders and professionals to meet head-on the challenges associated with significantly improving and advancing the operational capabilities of their firms. The CIOP designation does this through a rigorous belief in the power of knowledge as a shaper of performance, a builder of professionalism, a creator of ideas, and an inciter of innovation and change.

**Who Should Participate** The CIOP designation and conference is specifically designed for those who are focused upon contributing to improving the operational capabilities and performance of their firms. Recognizing that operational effectiveness and efficiency is dependent upon optimizing a wide range of critical disciplines, and forging tighter integration among these disciplines, CIOP candidates comprise a diverse group of talented leaders and professionals including:

- |   |   |
|---|---|
| :: Senior managers and operating executives     | :: Change sponsors, leaders and change agents   |
| :: Process designers and process owners         | :: Technology executives and professionals      |
| :: Division executives and managers             | :: Financial operations staff                   |
| :: Project managers, program office members     | :: Quality managers, customer service advocates |
| :: Business unit leaders, product line managers | :: Human resource professionals                 |
| :: Strategic and operational planners           | :: Internal consultants, business analysts      |
| :: Organizational development practitioners     | :: Team leaders and executive coaches           |

# The Process

## **The Chartered Insurance Operations Professional (CIOP) Designation Process**

The CIOP Designation provides candidates both a valuable and rigorous learning experience and the opportunity to attain and convey a certified level of recognized mastery throughout the Insurance Industry. The CIOP Designation process involves four concise steps:

**Step 1 – CIOP Designation Application:** Each candidate completes and submits a CIOP Candidate Application & Registration Form as contained within this brochure. Candidates will be contacted by the CIOP Institute to review the applicant's qualifications, industry experience and current responsibilities.

**Step 2 – Pre-CIOP Designation Conference Preparation:** A few weeks prior to the CIOP Designation Class, candidates will be provided a package of articles and topical notes for their review.

**Step 3 – CIOP Designation Conference Participation:** Candidates participate in a two and a half day conference which covers the fundamental bodies of knowledge, contemporary tools and techniques, and illustrative case studies drawn from actual company situations -- covering all the key elements associated with building and sustaining highly effective and efficient contemporary insurance operations.

### **Step 4 – Completion of the post CIOP Designation Conference Exam Project:**

Appreciating the importance of reinforcing the content of the designation class, participants are provided a take-away exercise that enables candidates the opportunity to summarize and review the key conference learning points. The assignment is intended to be completed by the candidates with approximately 4-6 hours of additional effort and will subsequently serve as a useful quick reference guide. Successful submission of the post conference Exam Project results in the awarding of the CIOP Designation.

For additional information or assistance regarding the CIOP Designation or Designation Class arrangements, please do not hesitate to contact the CIOP Institute at 1-866-930-CIOP or access [www.CIOPDesignation.com](http://www.CIOPDesignation.com)

*"We are excited about the CIOP course of study. The content is pertinent and comprehensive. It elevates our discipline and gives us a track for the ongoing development of ourselves as leaders and our staff. We have enrolled an additional three of our colleagues for the next CIOP Designee Class. We want our management to draw from a well-filled tool chest. We also see this as a powerful driver of culture – the right things getting done, the right way at the right time."*

- Senior Vice President  
AON Insurance Services

# The Class

**The CIOP Designation Class Syllabus** The CIOP Designation Class provides an intense two and a half day content rich presentation of the key underlying concepts and cutting edge techniques in designing, building, engaging and sustaining high performance insurance operations. Given the amount of information that is presented, and the respective knowledge to be gained by CIOP candidates, the teaching approach is particularly rigorous, interactive and dynamic. Topics that comprise the CIOP Designation Class include:

## **Operational Modeling and Analysis**

- :: Designing Effective Organizations & Operations
- :: Choosing the Proper Operational Elements
- :: Operational Planning and Deployment
- :: Organizational and Operational Architecture
- :: Normative and Contingent Models
- :: Designing the Customer Experience Focused Operation
- :: Strategy, Structure & Process Mix
- :: Developing Operations: Diagnosis and Action
- :: Creating an Operational Platform for Sustained Performance
- :: Designing Costs Out of Insurance Operations
- :: Lean Manufacturing and Insurance Service Delivery

## **Process Principals and Design Techniques**

- :: Insurance Process Design Principals and Best Practices
- :: Increasing Quality and Consistency While Reducing Costs and Time
- :: Current Process Assessment, Analysis and Calibration
- :: Aligning Processes Around Customers and Desired Business Outcomes
- :: Defining Process Governance, Process Ownership and Accountabilities
- :: From Reengineering, Through Six Sigma, and Process Modeling
- :: Process Enablers Versus Process Anchors
- :: Process Decomposition, Synthesis, Experimentation and Innovation
- :: Insurance Data Modeling and Use Case Scenario Analysis
- :: The Insurance Process Design Framework

## **Advancing Operational Performance through Metrics**

- :: The New Metrics – Characteristics and Contrasts
- :: Measurement Frameworks – From Balanced Scorecards to Cascading Frameworks
- :: Metrics that Highlight Business Performance Drivers
- :: Designing and Implementing Insurance Dashboards
- :: Creating High-Impact Measurement Presentations and Displays
- :: The Power and Potential Pitfalls of a Balanced Scorecard
- :: Shaping Behavior and Infusing Accountabilities through Metrics
- :: Fact-based Decision Making and Root Cause Drill-Down's
- :: New Ways of Measuring and Predicting Customer Satisfaction
- :: Future Trends in Metrics: Creating Rule Based Measurements For Insurance Operations

## **Technology Enabled High Performing Operations**

- :: Integrating Technology, Process and People – Best Practices
- :: Emerging Technologies that Will Shape Future Insurance Operations
- :: The Insurance Service Factory: Concepts and Technologies
- :: The Strategic Approach to Outsourcing – Leveraging Global Capabilities
- :: Turbo-charging Service Delivery Channels – Service Center Best Practices
- :: Developments in Project and Program Management
- :: Insurance Technology Delivery Framework Templates and Project Accelerators
- :: Linking Technology and Operational Innovations in Gaining Breakthrough Performance

## **Leveraging Human Capital for Sustainable Operational Excellence**

- :: Expanding the Knowledge, Expertise, and Dedication of the Workforce
- :: Socio-Technical Systems – Aligning People and Work Systems
- :: Building Improved Accountability – Managing the Five Levels of Accountability
- :: Building High Performing Teams – From Group Dynamics to Self Directing
- :: Organizational Culture, Leadership, Values and Beliefs
- :: Acquiring, Developing, Retaining, and Positioning Talent
- :: Emotional Intelligence Concepts and Applications Within Insurance Operations
- :: High Performing Job Design Strategies, Human Capital Indexing, and Reward Systems
- :: Problem Solving and Decision Making – Methods, Techniques and Style

## **Managing Change – Planning and Mobilizing For Improved Insurance Operations**

- :: The Ability to Change as a Competitive Advantage
- :: Integrated Models and Techniques for Operational Innovation and Change
- :: Understanding and Overcoming Resistance
- :: Defining and Executing an Effective Change Program
- :: Assessing Change Readiness – Setting the Conditions for Successful Change
- :: Creating a Tipping Point – Connectors, Mavens and Salesmen
- :: Institutionalizing Change and Harvesting Operational Benefits

## **CIOP Tuition & Designation Class Registration Fees**

The CIOP tuition for those applying and registering through April 26<sup>th</sup> is \$1,850. After April 26<sup>th</sup> the tuition is \$1,950. Recognizing that a unified, collaborative and well trained team contributes to operational success, insurance organizations have the option of sponsoring team attendance. Under these circumstances, a team discount of 10% for 3 or more participants will be applied.

The CIOP Designation Class will be held May 12 - 14, 2010 at the American Management Association Executive Conference Center, 1601 Broadway in New York City. Sessions will be conducted from 8:30 AM to 5:PM on Wed., May 12<sup>th</sup> and Thurs., May 13<sup>th</sup>. The Friday, May 14<sup>th</sup> session will begin at 9:AM and conclude at noon to facilitate afternoon travel. Hotel information is available on the CIOP Institute web site [www.CIOPDesignation.com](http://www.CIOPDesignation.com).

# Designing, Building and Leading World Class Insurance Operations

**Earn your CIOP Designation while mastering underlying business concepts, proven techniques, and powerful tools in reducing costs, improving service, and achieving profitable growth.**

- Modeling, developing, and deploying a high performance operations strategy
- Driving operational excellence through new scorecards and metrics
- Competing on Analytics – Leveraging operational data in gaining speed and precision
- Insurance operations that deliver unparalleled customer experience
- Consistently delivering world class service and building competitive advantage
- Operations that give traction to business strategy, product development, and compliance
- Technology enabled operational excellence: The emerging technologies that will shape insurance operations of the future
- Turbo-charging insurance operations, service delivery and call centers
- New frontiers on managing change – Building accountability throughout the organization
- New process design techniques to gain operational speed and flexibility
- Lean operational manufacturing disciplines that cut costs while contributing to premium growth
- Create, develop, and execute an operational human capital strategy and talent program
- Case Studies – How insurance firms attain breakthroughs in costs, quality, speed, growth and customer satisfaction

**Given the significant amount of content to cover and knowledge to convey, the CIOP process and instructional approach is rigorous, interactive and dynamic.**

CIOP faculty members cover topics in a variety of ways using a range of media. Each topic is fully explored and addressed by way of underlying concepts and how these concepts bear significance to insurance operations. Presentation of course content is further expanded upon through the use of actual insurance industry examples and case studies. As such, the entire CIOP Designation and learning experience is intensely pragmatic and of immediate relevance and value to CIOP candidates.

CIOP Designation Classes are designed to support a limited number of candidates to avoid compromising the quality of the program; ensure the proper participant profile; and enable the greatest degree of interactive learning. Potential CIOP candidates are reminded that the CIOP process is not geared to a huge audience. This is a highly interactive, intense, development program specifically designed to advance the level of knowledge, skill, and respective recognition of insurance professionals dedicated to improving insurance operations.

# CHARTERED INSURANCE OPERATIONS PROFESSIONAL DESIGNATION CLASS

MAY 12 - 14, 2010 NEW YORK, NEW YORK

## APPLICATION & REGISTRATION FORM

### HOW TO REGISTER

**Phone** 866.930.CIOP

**Fax** 866.308.9686

**Mail** CIOP Institute  
243 5<sup>th</sup> Avenue  
Suite 705  
New York, NY  
10016

Please note that hotel charges are not included in the application and registration fee. In addition to the numerous hotels within easy walking distance of the CIOP Designation Class, AMA has negotiated preferred rates at various hotels. Access a listing at [www.ciopdesignation.com](http://www.ciopdesignation.com) or call 1.866.930.CIOP for additional hotel options and information.

Attire: The dress code for CIOP-related activities is business/ business casual.

### CLASS LOCATION:

American Management Association Executive Conference Center  
1601 Broadway  
New York, New York  
10019

### REGISTER EARLY!

Demand for the 2009 Designation Class was far greater than could be accommodated. Please register early to avoid being wait-listed.

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NAME

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TITLE DEPARTMENT

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COMPANY

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ADDRESS

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CITY, STATE, ZIP

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TELEPHONE FAX

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E-MAIL

Please photocopy the above for each registrant.

**Conference Tuition** \$1850 before April 26 \$1950 after April 26

**Team Discount:** 10% for 3 or more participants will be applied

### Payment Method

Check enclosed for \$\_\_\_\_\_. Please make payable to the CIOP Institute and remit to CIOP Institute, 243 5<sup>th</sup> Avenue, Suite 705, New York, NY 10016

I prefer to pay by check. Please only use my credit card information below to guarantee my registration until you receive my check. I understand that if my check is not received two weeks prior to the conference, the CIOP Institute will charge my credit card.

Credit Card payment for \$\_\_\_\_\_

VISA  MasterCard  American Express

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CARD NUMBER (AMEX, VISA, MC only)

EXPIRATION DATE

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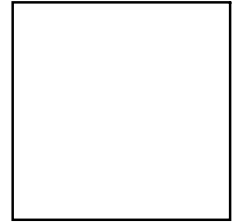
### Terms and Conditions

- Payment must accompany this form in order to process this application.
- Cancellations can be accommodated up through April 20<sup>th</sup>. A service charge of \$250 will be assessed cancellations to cover administrative expenses.
- "No shows" will be charged the full conference price.
- Payment must be made in US Dollars, payable to The CIOP Institute.

# CHARTERED INSURANCE OPERATIONS PROFESSIONAL DESIGNATION CLASS

DESIGNING, BUILDING & LEADING WORLD CLASS INSURANCE OPERATIONS

CIOP Institute  
243 5<sup>th</sup> Avenue  
Suite 705  
New York, NY  
10016



**May 12 – 14, 2010**  
**New York, New York**

Earn your CIOP Designation while mastering underlying concepts and cutting edge techniques in reducing costs, improving service, and achieving profitable growth

- Operational Modeling and Analysis
- Process Principals and New Design Techniques
- Advancing Operational Performance thru Metrics
- Technology Enabled High Performing Operations
- Leveraging Human Capital for Sustainable Excellence
- Managing Change – Planning and Mobilizing for Improved Insurance Operations

*“To the authors and creators of CIOP...thanks. The class curriculum was well thought out and organized. The speakers/instructors were superb. The follow up test and exercise were practical, timely and rewarding for our organization. Just the few things we’ve done since attending the class will generate over a half a million dollars. What a great investment for our organization.”*

- Jim McCafferty, President/CEO  
American Automobile Association  
The Member Insurance Company

## CIOP

Chartered Insurance  
Operations Professional

866.930.CIOP tel 866.308.9686 fax

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

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