



RISE

Rising Insurance Star Executives

Recognizing and Advancing
Best Young Professional
Talent in the Insurance Industry

SECOND ANNUAL RISE AWARDS

July 2018

CONGRATULATIONS to all the winners of the second annual RISE Awards! Your peers, supervisors and industry colleagues have picked you out as the next generation of star executives. We received dozens of nominations, so as you can imagine, it was difficult to narrow down to just ten. We look forward to following you in your career as you progress and grow and bring others with you.



To Everyone in The Insurance Industry: Thank you for supporting a young professionals group that recognizes and advances the best young talent in the insurance industry. If you haven't partnered with us yet, we're looking forward to having those discussions and making strides together as an industry to bridge the talent gap.

2018 is the continuing annual list; you can look forward to seeing more from RISE in the coming months and our list published annually. Please follow our LinkedIn to stay updated on news, events, and free CEU/CLE. If you haven't joined yet, hurry and do so soon to have full access to the group. New this year will be a job posting board, scholarships for conferences, and new partners.

Thank you to everyone who participated and congratulations again to the winners!

Amy Cooper
Founder, RISE

ABOUT THE AWARDS SELECTION PROCESS

To be eligible, nominees must be under 40 or have less than 10 years of industry experience. Ideal candidates are superstars, management or executive track, and demonstrate leadership within their organization and community. Nominations were taken through May 31, 2018.

RISE considered all details provided in the nomination, their supervisor references, and additional supporting documentation. Sponsorship or membership does not contribute to selection, only applicant merit. Nominations were reviewed and considered by participating board members to produce a final selection.

ABOUT RISE (RISING INSURANCE STAR EXECUTIVES)

THE VISION

RISE is one solution to bridging the talent gap in the insurance industry and re-branding our image. Our vision is to create a springboard for rising professionals that are tagged for the executive management track, while providing a knowledge transfer strategy to their employers and the organizations that support claims, legal, and SIU. We achieve this through our 5-Point Star Program: Recognition, Education, Engagement, Leadership, and Collaboration.

OUR STORY

Chief Claim Officers and CEOs have been talking about the talent gap and the need to attract and retain good talent in the insurance industry for years. We know that an increasing number of key management and executives are retiring every day and companies need a knowledge transfer strategy to raise up the next generation of workers. The insurance industry is competing for coveted talent, and it is apparent that things will need to change if we are going to attract and keep them.

Most young or new employees, even at management level, do not get the opportunity to attend conferences and interact with professionals outside their company who have already proven themselves. Many executives have shared concern about the next generation's ability to think and act professionally. Very few organizations have young professional groups, and the few that exist don't have an industry-wide presence. If you were lucky enough to know in college you would be working in insurance, you may belong to a fraternity, but what about the rest of us who are here "by accident"?

HENCE, RISE WAS BORN

Involvement in industry events and seeing firsthand the career path that insurance can offer creates engagement and retention. That's why we're gathering the brightest rising stars and collaborating with existing organizations to funnel rising talent into the industry, educate, connect with, and recognize them.

RISEprofessionals.com



HONORING THE 2018



ERIC AFRE
CENTRALIZED SPECIAL
INVESTIGATIONS MGR.
NATIONWIDE INSURANCE
COMPANY

OHIO PAGE 7



PATRICIA PRECIADO
PARTNER & FIRST PARTY
PROPERTY CHAIR
ROIG LAWYERS

FLORIDA PAGE 10



MATTHEW ROBB
APD ADJUSTER
MAIN STREET AMERICA
GROUP

MASSACHUSETTS PAGE 23



AMY CARR
OPERATIONS MANAGER
RESOURCE PRO

NEBRASKA PAGE 22



TONY CAÑAS
CHIEF MOTIVATIONAL
OFFICER
INSURANCE NERDS

OHIO PAGE 11



BRANNON BERRY
ASSOCIATE ATTORNEY
COSMICH SIMMONS &
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LEANN WATSON
LEAD CONSULTANT
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TERENCE KADLEC
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JAMES EMMING
SENIOR CLAIMS AUDITOR
THE CINCINNATI
INSURANCE COMPANIES

OHIO PAGE 13





Claims is the greatest arena of differentiation among modern insurers. A claims experience is likely the primary touchpoint our customers have to consider when it comes time to decide whether or not to remain a customer. How well we serve them in their moment of need is often the make or break moment of the relationship.

In recent years, I've watched as technology adoption has transformed nearly every facet of the life of a claims representative. From process to culture to customer service, our every function has become more dynamic and talent-friendly.

Embracing Innovation

The insurance industry has always offered tremendous career opportunity — I should know; I started as a claims representative straight out of college and now serve as Chief Claims Officer. But the fact that our culture at Farmers® has evolved and come to celebrate technology has allowed us to pair the traditional benefits of a career in claims with values that matter most to younger generations: innovation, flexibility, and balance.

This new paradigm benefits employees and customers alike. Whether it's working remotely or having the option to communicate via an alternative channel, we've implemented technologies that improve both

sides of the claims experience.

It's No Longer Business As Usual – It's Business As You Like It

In this business, you're unlikely to have two days in a row that are similar, and increasingly, there is more than one way to get the job done. We have an entire toolbox of technologies that streamline the way we work even as they expand the service and support we offer our customers.

Today's customers can "Ask Alexa" for claims updates. They can send a text to file a claim. They can connect to the chat team for simple inquiries and get rapid answers and solutions. Our teams have drones to help them assess damages in the field. Employees can work from almost anywhere with an internet connection. The list goes on, but it all adds up to this: We're doing good work with great people in smarter ways. That's an outcome we want to repeat again and again, because it helps us attract, retain, and develop the best talent to serve our policyholders.

Communication Is Still Key

And speaking of talent, I think it's important to note that technology hasn't eliminated the core traits of a good claims representative. Rather, it's made it easier for those with the right skill set to thrive.

Claims has always been the domain of self-starters and great communicators. That's as true now as ever, though the tools used to get the job done are certainly different from those used when I got my start in this discipline. Yet dependability, willingness to learn, and interpersonal skills are still keys to success in claims and, for that matter, in the larger insurance industry.

Claims is where the connection we have with our customers comes to life. Our success or failure there comes down to the talent we have on our side. Fortunately, there's never been a better or more exciting time to be a claims representative. No matter their ultimate career goals, this field is the perfect proving ground for upcoming talent to refine their skills and master their trade. Innovation is all around us, transforming the work we do for our customers and, critically, enhancing the work of all those who are creating the claims experience of tomorrow.

 **ERIC AFRE**
2018 RISE AWARD RECIPIENT



ERIC AFRE
CENTRALIZED SPECIAL
INVESTIGATIONS
MANAGER

NATIONWIDE INSURANCE
COMPANY

OHIO



Eric has been an important voice to Nationwide Claims senior leadership on behalf of minority associates, including millennials, and he has great passion for the SIU profession.

Since February 2016, Eric has been the Centralized Special Investigations Manager with Nationwide. Eric joined Nationwide in 2010 as a Field Investigator then transitioned into the Major Case Unit. He has 18 years of experience in the insurance industry, specifically with multi-line claims investigations, operational management, medical fraud investigations, white collar crimes, and fraud risk auditing. He is a graduate from Southern New Hampshire University with a Bachelor's degree in Operation Management and is currently pursuing his Master's degree in Economic Fraud Management. Eric holds his Certified Fraud Examiner (CFE) and a Fraud Claims Legal Specialist (FCLS). In addition, he is the Chair for the P&C D&I Council for Nationwide. He is an advocate for change to make all associates feel welcome and included at Nationwide Insurance.

“Eric is a very busy manager, yet he finds time to leverage opportunities to make Nationwide a great place to work and is a positive role model for change.”

– Kevin Hilyard, Nationwide

RISE to the Occasion: Eric holds a responsible position leading a team of seven fraud investigators. In addition, Eric has volunteered his time and his services as a leader within the Nationwide Claims Diversity and Inclusion Council.

Insurance and the Human Connection

By: Darla Finchum, Chief Claims Officer, MetLife



In a world where digital technologies are continuously integrated into our personal and professional lives, there is a balancing act between human connection and automation. Despite the benefits of automation and new AI capabilities, employees still seek a humanized workplace where they can thrive. In fact, 65% of employees note their co-workers are like family and 60% said work helps shape their identity, according to a recent MetLife survey.

It's clear that work life and personal life delineation is getting thinner and employers need to have a deeper understanding of how to help employees thrive. For instance, look at the value belief system – the purpose of work for greater insights on what motivates engagement and loyalty. MetLife found that nine out of ten people would choose a company with similar values over a job that pays more. The survey asked more than 1,000 employees over the age of 21 in a variety of industries what they look for when selecting a place of employment. Three quarters said they want a company that both supports them financially and acts as a good corporate citizen by demonstrating that it cares about the community and well-being of its people.

Not only are the company's values important to employees, but also the role of the employer. In fact, looking forward to the next 5 to 10 years, millennial employees are looking for their employers to be more involved rather than less. MetLife's Role of the Company survey

found millennial women were more likely than average to desire greater involvement from companies in providing career development and training programs, financial wellness, health insurance and retirement security.

Understanding not only what its employees' desire, but also the role it plays in its employees' lives, MetLife Auto & Home has worked diligently to provide its team members with an environment and culture in which they can thrive. When we re-opened our Freeport, IL offices in May 2017, the company focused on providing an updated, cutting-edge, collaborative work environment to foster innovation. Recruitment for the new office focused on college graduates with two to four year degrees, who wanted to work in a professional atmosphere with growth opportunities.

In the first few months, more than 100 new team members were hired, exceeding the initial plan of adding 150 jobs over two years, bringing today's total to more than 300 employees. As a company, we estimate we will add nearly 100 additional jobs by 2019, bolstering our local workforce. Furthermore, as a company who strives to be good corporate citizens, MetLife Auto & Home and our associates are supporting Freeport through volunteerism and supporting local initiatives to help bolster the community, including financial contributions to the Greater Freeport Partnership and working with NonProfitTHRIVE, an organization that runs a platform designed to match volunteers with nonprofits and track volunteer hours.

Across MetLife Auto & Home's 16 offices and nearly 3,000 associates, understanding what the employee values can not only support and help them to thrive but also have a positive impact the business. The next generation of the insurance workforce has an opportunity to share their values and contribute to a more humanized workplace as well as use their voice as innovative, problem-solving customer advocates. These rising professionals can not only make a difference within their company's culture but a positive impact on their communities and customers they support.

CAMERON DAVIS

2018 RISE AWARD RECIPIENT

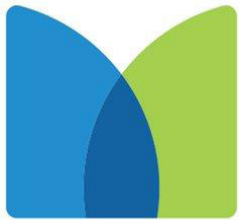


CAMERON DAVIS

UNIT MANAGER

METLIFE PROPERTY &
CASUALTY

NORTH CAROLINA



MetLife

Cameron (Cam) started in the MetLife Property and Casualty organization as an Inroads Intern. He immediately demonstrated his value by making instant contributions to our organization. We were fortunate that Cam rotated through the Claims Department during his internship. After his internship period, he was hired as a frontline adjuster and ascended through the ranks with increasing levels of responsibilities. He has been highly rated in all the positions he has attained. In addition to grooming newer associates in the insurance industry in his new role, Cam also created opportunities to develop tools and mechanisms to make our work more efficient and effective in our customer interactions. He identified root causes of problems and supported the creation of sustainable solutions.

"Cam has earned these opportunities as he is a forward-thinking leader and has demonstrated excellent foresight into the needs of our organization."

– Jonathan Gould, MetLife

RISE to the Occasion: Cam's role as a Change Agent has improved our claims organization. His contributions transformed the way our Claims Organization interacts with our customers. While many organizations may believe that they are focused on the customer, our transformation created a culture where the customer is the focal point of our decisions and our direction. Cam differentiated himself in this regard and excelled in his ability to drive change and operational excellence.

PATRICIA PRECIADO

2018 RISE AWARD RECIPIENT



PATRICIA PRECIADO
PARTNER & FIRST PARTY
PROPERTY CHAIR
ROIG LAWYERS
FLORIDA

Before joining Roig Lawyers in 2013, Patricia gained experience at a plaintiff's first-party property insurance claims law firm. Since that time, she has been focused on managing all types of first-party property matters, such as claims denied under policy exclusions, claims denied pursuant to failure to comply with policy conditions, and claims wherein payment was issued and the amount of recovery due remains in dispute. Patricia solidified her role as chief for first-party property matters and distinguished herself as a leader, not only in that practice, but within the firm as a whole.

Patricia's focus and dedication to her practice has not only earned her a role as the Chair of the First-Party Property practice group but she also became a Partner at Roig Lawyers in the first quarter of 2018. She plays an integral role in managing property matters caseload and guides ROIG's property team to success.

"Ms. Preciado has recently been promoted to Partner as a testament to her hard work, dedication and leadership."

– Celina Metlick, ROIG Lawyers

RISE to the Occasion: Patricia has published two articles on the topic of first-party property claims; one in the Daily Business Review and the other in the Florida Defense Lawyers Association Publication Trial Advocate Quarterly.

TONY CAÑAS

2018 RISE AWARD RECIPIENT



TONY CAÑAS
CHIEF MOTIVATIONAL
OFFICER
INSURANCE NERDS
OHIO

Tony plays four roles; Chief Motivational Officer at Insurance Nerds, an insurance blogger for InsNerds.com, a podcaster at ProfilesinRisk.com, and publisher of InsuringTomorrowBook.com and WhenWordsCollideBook.com. Tony also hosts ChatWithTony.com where he offers free career advice to hundreds of insurance professionals of every level each year. Tony also does a lot of speaking at insurance conferences on how to engage and retain Millennials and Gen Zers in insurance. He has been a passionate voice for the insurance industry for several years, especially in recruiting and retaining young insurance professionals and in helping the industry understand how to best engage young professionals.

Tony donated 185 hours last year and 50 hours thus far this year into ChatWithTony.com where he has free career conversations to help insurance professionals grow their careers.



"Every week, I dedicate 10 hours of my evenings to helping other insurance professionals get engaged and grow."

– Tony Cañas, Insurance Nerds

Rise to the occasion: Tony's book, "Insuring Tomorrow: Engaging Millennials in the Insurance Industry", along with the 300+ articles and 80+ episodes of his blog and podcast.



Working in Claims - A Broad Exposure to the Insurance Industry

By: Allan Robinson, CPCU, Executive VP of Field Operation & Sales Management,
Chief Claims Officer at Horace Mann



Working in claims gives you broad exposure to the insurance business and provides the opportunity to hone your skills, both in soft skills like customer service and in skills that are more technical. It is where many in the insurance industry get their start.

A quality claims employee is a problem solver, an individual with strong interpersonal skills mixed with a solid financial, math mindset. The claims employee of today needs to be tech-savvy, have an insatiable appetite to learn, and easily adapt to a changing landscape. Keeping up with current communication technology is essential, but also, for long-term success, you need to engage in and develop your face-to-face communications skills. There are going to be in-person moments – and probably during some of the most challenging moments in life for the client. The combination of understanding people and service, along with strong analytics, is the foundation of success.

In other words, success in claims requires you to be an expert in many areas and that can be both exhilarating and a challenge. The need to dig in, expand your knowledge, and broaden your experience is not for everyone. We all start with basic, simple claims, but then move to more complex claims, requiring you to be more analytical, and likely make the service aspect more complex.

In addition, claims can provide a good base from where

you branch out. The insurance industry encompasses every discipline – finance, marketing, human resources, public relations, and sales.

You should expect your company to help you plan and implement a career plan. Use the tools your company provides to make sure you know what you want and what will work best for you – and then you can be your best for the company. You may be looking for work-life balance, a good vacation benefit, the ability to have a flexible or alternative work schedule. Communicate your expectations to your manager and ask questions. Your development is a joint responsibility between you and your company, as it benefits both of you. Invest some time in yourself and seek out the tools your company has to help you reach your career goals.

You will also want to seek out a company that knows how important it is to think outside the box, to be agile, and gives you the chance to challenge yourself. Whether you are assisting with an upgrade of systems, adopting new, more efficient ways of operating or learning new elements of the business, you need a company that challenges and stimulates your mind, and finds ways to motivate you to elevate your game. It is important to find a company that knows you make a difference for the customer, gives you credit and recognizes you when you make significant contributions and knows you are one of the reasons the company is successful.

Claims can be a very challenging job, but the feeling you get when you help bring resolution to a customer who has lost their home to fire or been affected by an auto accident, is very rewarding. In claims, you have the opportunity to take care of customers in their biggest moments of need, contribute to the success of the company, and build a life-long, rewarding career for yourself.

JAMES EMMING

2018 RISE AWARD RECIPIENT



JAMES EMMING
SENIOR CLAIMS AUDITOR
THE CINCINNATI
INSURANCE COMPANIES
OHIO



James chose a career in insurance because it gives him the opportunity to help people when they need it most, along with the chance to solve complex problems. James expresses, “As a claims representative, you show up knowing that you can’t replace the memories or sentimental value, but insurance means we can put a roof back over their heads and help get them back on their feet. Insurance is a noble profession with a growing number of career opportunities. I tell everyone, if you like helping people, insurance might be the right career for you.”

“James has been instrumental in the rollout of our new File Review program for field claims representatives. He designed and helped implement an electronic workbook we use to compile information used in the annual review process for field claims associates. His contributions helped us improve the consistency of the file review process, enabling more accurate comparisons.”

- Kenneth Kerby, The Cincinnati Insurance Company

RISE to the Occasion: James is a problem solver, regularly assisting others to help them more efficiently complete their work. When he doesn’t know something, he proactively seeks out instruction or training. He’s not happy with the status quo and is always interested in upping the game and finding better ways to complete audits. James is working to innovate audit processes with the use of artificial intelligence and text mining so that he and coworkers can apply their expertise and knowledge where it’s most needed.



JOIN RISING INSURANCE STAR EXECUTIVES (RISE)

Stand out as a leader in our industry, build your resume, network with like-minded individuals and take advantage of all the resources RISE has to offer.

RISE MEMBERSHIP:

Memberships are available to anyone currently employed by an insurance carrier, self-insured corporation, or in-house legal who are management/executives or management/executive track. Memberships are held by the individual, not their company. Members join by being nominated, filling out the online application with professional reference, or by being an annual RISE Award Recipient. Once accepted, Members are added to the closed LinkedIn Group, distribution list, have access to discounts for events, and may apply for scholarships.

For more information, visit: RISEprofessionals.com.

 Follow us on LinkedIn

FIVE PILLARS OF RISE



LEADERSHIP

Shine as we provide a platform for Members to publish thought leadership pieces, open opportunities for Members to speak at events, take on leadership roles within RISE, or even start a local chapter.



EDUCATION

Arm yourself with the best personal and professional development brought to you monthly via webinar. Gain access to engaging and diverse speakers. Take advantage of free continuing education credits.



COLLABORATION

Providing companies and young professionals a knowledge transfer strategy. Connecting the brightest talent from various organizations and helping them collaborate with peers as well as with the top executives of our industry who have experience and knowledge to share.



RECOGNITION

Get profiled as a stand-out young professional in the insurance industry.



ENGAGEMENT

Get engaged by enjoying opportunities to attend industry conferences and events at significant discounts or win a scholarship to attend for free.

THANK YOU TO OUR 2018 SPEAKERS

Check the website for upcoming webinars: www.RISEprofessionals.com



January

Jane Bolin
Founder and Managing Partner, Peyton Bolin
Scheduling Your Time For Results



February

Elizabeth Fitch
Founding Member, Righi Fitch Law Group
Empowering the Next Generations of Leaders
Through Effective Mentoring



March

Chris Mandel
SVP, Strategic Solutions, Sedgwick
10 Building Blocks of Risk Leaders' Success



April

Caryn Siebert
Vice President, Carrier Practice, Gallagher Bassett
Great Opportunities in Insurance



April

Abel Travis
Head of Innovation, AF Group
Innovating a 300 Year-Old Industry



May

Cathy Gicker
SIU Litigation Specialist, Allstate
Faces of Fraud



June

Lisa Unger
Senior Claims Examiner, Markel Corp
Thinking Outside the Box

I.M.P.A.C.T. YOUR WORLD

By: Margaret Sherlock, VP Regional Director, Staff Counsel, Selective Insurance Company



INFLUENCE Networking and developing relationships across company departments and within industry groups will help you become known. Always consider your networking efforts as selling yourself utilizing humility, authenticity and open-mindedness. The more people who know you, the more likely it will be that you will be recommended and approved for project teams. Once you perform well on a project team, the likelihood of more seats at more tables increases exponentially.

MOTIVATE Motivating yourself and others takes determination, drive, and direction. The key is to communicate the way in which you want or need to work so that others with a different approach are not distracted. For example, take the goal of completing timely reports. The way in which the generations will achieve this goal with work-life balance as a priority is an interesting study. A long-tenured employee has voiced a need to leave work at 5pm due to fatigue but vows to work weekends to get to the work he was unable to complete during the week. At the same time, a millennial chooses to work through the work day without taking breaks in order to finish at 5pm and eliminate the need to work weekends. The two approaches are neither right nor wrong (as long as the employer permits flex time). What matters is that the reports are done in a timely manner and that the generations discuss their different approaches without judgment.

PERSEVERE Influence and motivation, as they have been described, may seem like straightforward prescriptions for success; until you try them once and it does not succeed. The reality is that these strategies may not work the first time, the second time, or the eighty-second time. Perseverance means we don't give up, don't take our failures personally, and we maintain a positive attitude. It means we debrief and reflect on what worked well and what didn't work so well so that we know what to do next time to achieve success. The most

important part of perseverance is the realization that we are all a work in process. Giving up on ourselves or others is not an option.

ADD VALUE The workplace which comprises the insurance industry is filled with people like us: intelligent, dedicated, driven, success-oriented, and able to get the job done. If so, what is the secret then to making an impact? We can make an impact through developing a deep understanding of what increases revenues, decreases expenses ,and gets the job done more efficiently. Adding value does not have to be something big.....it only has to be impactful. Recently, an insurance company commenced an initiative based upon continuous improvement. All employees are encouraged to submit ideas which would allow us to work more efficiently. Ideas such as centralizing calendars, eliminating acknowledgment letters, and reducing the number of case conferences necessary are but a few recommendations which added value.

COMMUNITY The focus millennials have on community is a perfect way to give your job purpose. Not every job has a naturally occurring deep meaning, higher purpose, or intrinsic societal value. To find meaning and purpose, one must look beyond the day to day-tasks and focus on the big picture. For example, insureds purchase insurance for one reason....to protect themselves. When a claim is made against them, do you offer them a sense of calm and that everything is in control? Do you advise them on the risks involved in their business about which they appear to be unaware? The care and concern with which you interact with insureds will provide meaning and purpose to your job. You can easily have a positive impact on the community of insureds when you instill confidence that everything will be taken care of.

TRANSFORM Whether you know it or not, millennials are changing the working world. To make a positive impact, the transformation must occur when everyone is collaborating. Recognize the differences, between the generations, communicate about those differences and come to an understanding about how everyone's goals can be achieved, even when the approach may be different! For example, if you're looking for a promotion, have a conversation with your boss about your desires, their expectations, what you can do to get there, and the timeline of what that could look like. If your expectations and that of your boss are not in sync, then you have choices to make! You are responsible for your own transformation!

LEANN WATSON 2018 RISE AWARD RECIPIENT



LEANN WATSON
LEAD CONSULTANT
ALLSTATE INSURANCE
COMPANY
ILLINOIS

Leann is a forward thinker and has the ability to see a vision of how we will be working in 3 - 5 years and design and build towards that. She digs into the details to understand risks, but pull it back to see the grander picture to develop strategy. Leann also collaborates well with her peers and recognizes when to notify stake and shareholders for transparency and partnership.

“Transparency, identification of risk and moving ideas to action. She is action oriented, always looking for solutions to move work forward to production, but has the keen awareness of risk, so recognizes when to raise issues to leadership..”

– Barb Norton, Allstate

RISE to the Occasion: Leann was the claim lead on the design and implementation of medical bill automation for Allstate Insurance Company. This reduces cycle time which improved customer experience. She also identified how to complete detailed risk assessment of automation models for future endeavors. She also received multiple performance bonuses for delivery of strategies and won the Distinguished Performance Award, given to the top 2% of employees for performance above and beyond expectations. Leann moved our company from 0% bill automation to goal in 6 months and continues to make progress towards larger targets.



*New ideas. Many perspectives.
One goal.
Improving the claims process.*

Congratulations to all the recipients!



WHAT GENERATION GAP?

Remember all the concerns about the “generation gap” in the workplace? Overrated, I say!

Sure, we still need to talk about and learn the skills to bridge the gap, but this publication is a testament that all of us, Baby Boomers, Gen X, Y and Z’s, have succeeded in bridging the generation gap!

The individuals nominated and recognized in this book are the rising leaders in the industry because they are and have been bridging the generation gap. They are learning from, listening to, and improving upon the industry, and helping the industry realize its future.

The individuals who took the time to nominate and judge the applicants also deserve to be recognized and thanked. They, too, are bridging the gap! And so has everyone who has developed and participated in the RISE webinars. So, congratulations to you, too! And, thanks!

We will forever be bridging the gap from one generation to the next. And things will continue to change. They have to! The insureds all have different needs and this, in turn, has driven innovation in the industry.

Today, I see more articles about innovation in the workplace than I do about the generation gap in the workplace. This means the skepticism and worry has been replaced with hope, optimism, and excitement! And that’s awesome!

Articles about the generation gap in the workplace almost always started with the foregone conclusion that the baby boomer generation had the “right” work ethic and the “right” way to do things. The good news is that wiser sentiments have prevailed and the industry knows the younger generations are adept problem solvers with amazing new tools that have the potential to radically change every aspect of the business, from underwriting and claims, to marketing and sales.

It’s an exciting time to be part of the industry! Insurtech. Big Data. Artificial Intelligence. Huge sums of money pouring in from venture capital and private equity firms! Insurance companies running their own VC funds!

For anyone still looking on how to bridge the gap, or how to land on this list next year, I suggest we learn from this year’s recipients! Here’s my take-aways from reviewing the applicants this year:

They are engaged in their work, add value to their organizations, sometimes by making (very small) valuable suggestions, and are active in their work and personal communities, oftentimes commingling the two. They are patient, inquisitive, and coachable. They share their insights, thoughts, and ideas and do so with supporting data and evidence and the expectation that change will be incremental, not overnight. They see the “Big Picture” and identify tangible first steps. They work hard, yet still have a balanced life.

I hope this inspires all of us to be the best versions of ourselves in 2019!

Congratulations again to all those nominated and being recognized today!

Sincerely,

Jonathan Broder
CEO, VortexLegal



CONGRATULATIONS!

From your Envista Forensics Family



TERENCE KADLEC 2018 RISE AWARD RECIPIENT

**“THANK YOU FOR
YOUR HARD WORK
AND DEDICATION!”**

*- The Team at Envista
Forensics*

TERENCE KADLEC, PE

PRACTICE LEADER - CONSTRUCTION & DEFECT GROUP

Congratulations to Terence Kadlec, PE for being named a 2018 RISE Award Recipient. Mr. Kadlec is the Practice Leader of the Construction & Defect Group and an integral part of the Envista Forensics Team.



ENVISTAFORENSICS.COM | 888.782.3473



TERENCE KADLEC

2018 RISE AWARD RECIPIENT



TERENCE KADLEC
NATIONAL PRACTICE
LEADER
ENVISTA FORENSICS
COLORADO



Terence has been able to achieve in the short year and half in which he has occupied the newly-created Practice Leader position. With his apparently boundless energy, hard work, leadership and thoughtfulness, he has quadrupled our work for the Construction Defect claims sector. Much of this growth is because of Terence's incredible expertise and the expertise of those with whom he has deliberately surrounded himself, but it also has a lot to do with how he has selflessly become an advocate for the sector in general. In short, he has become an indispensable trusted advisor for our clients as well as a role model, not just for our other practice leaders, but for all of our forensic experts.

“Like any Practice Leader, there are many demands for Terence's time and he is pulled in many different, and frequently opposite, directions. Our company was pleased to recognize him for his outstanding internal customer service. No matter how busy he is with his own work, he always finds time to help others. He constantly amazes me with his ability to serve as a thought leader, not just to our company, but to the industry.”

– Bob Wedoff, Envista Forensics

RISE to the Occasion: While he is well-known for his passion for sharing his insights and expertise through education in countless venues, the stand-out educational event occurred in April, when he assembled a cross section of adjusters and attorneys for a hands-on seminar. Reminiscent of the TV Series, Myth-Busters, Terence's students were active participants in dramatic scientific experiments that illustrated some of the most relevant construction defect events.



★ AMY CARR

2018 RISE AWARD RECIPIENT



AMY CARR
OPERATIONS MANAGER
RESOURCE PRO
NEBRASKA

Amy, Operations Manager of the ReSource Pro Insurance Experience Center, has participated in the Big “I” National Young Agents Committee, Omaha Underwriters Associations, and TeamMates Mentoring.

Based on Amy’s prior experience and knowledge, she was selected to build and lead a new industry team from the ground up. She was able to grow the book from 5 accounts to over 1000 in less than 5 years. During that time, Amy built standard operating procedures, automation, a client portal and many other initiatives to help increase efficiencies and improve the customer experience.

“Amy has a desire to improve the insurance industry alongside a passion for changing the perception of insurance by younger generations. She has positioned the industry as one of the top fields to pursue after college.”

– Erick Mancebo, ResourcePro



RISE to the Occasion: Amy has transformed the way insurance agencies operate. By optimizing processes, she and her team create efficiencies and improve the customer experience. Amy’s utilization of technology and new training techniques has not only ensured that ReSource Pro is prepared for the future of the insurance industry, but has also been integral to cultivating the Insurance Experience Center’s award-winning customer service.

★ MATTHEW ROBB

2018 RISE AWARD RECIPIENT



MATTHEW ROBB
APD ADJUSTER
MAIN STREET AMERICA
GROUP
MASSACHUSETTS

Matt is a superstar. He joined the Main Street America Group in December 2016 as an APD adjuster. He worked for one of our competitors as a Casualty Adjuster. He joined MSA in the hopes of being promoted to a management position. Matt excelled in his role as an adjuster. He handled comparative negligence claims for 30+ states and a short time later began handling our special investigation claims. Matt was nominated for the 2017 4th quarter Achieving Claim Excellence Award for demonstrating superior adjusting skills. He submitted additional files and was nominated for the First Party Adjuster of the Year in 2017 for Achieving Claims Excellence. In February 2018, Matthew was promoted to an APD Unit Manager role.

“Matthew has excelled as an adjuster and is a role model for adjusters and managers within MSA. His interpersonal skills are superior..”

– Debra Pospiel, Main Street America Group



THE MAIN STREET
AMERICA GROUP

RISE to the Occasion: Matthew was nominated for the 2017 First Party Adjuster of the Year Award. His investigations were complete and detailed. His files as an adjuster, and now as a unit manager, are like reading a chapter in a book. (No questions are unanswered.)

Matthew has received the 2017 4th Quarter Achieving Claim Excellence Award, nominated for the 2017 First Party Adjuster of the Year, You Make a Difference Award for going over and above and Spot Bonus for training new employees and mentoring our newest adjusters. In February 2018 he was promoted to an APD Unit Manager for a unit that handles over 30 states for personal and commercial claims.

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Most lawyers can be creative and make great arguments, but Brannon does it with passion and a huge smile on his face at every step. I've never seen a lawyer get so jazzed and passionate about the application of law to facts. Brannon makes our firm culture fun and rewarding. He's just authentically different and it's clearly contagious. Brannon is active in the Claims Litigation Management Alliance and promotes the firm and his practice at local and regional events. He is a founding member of the Jackson, Chapter for the Claims Litigation Management Alliance, newly created in 2018.

"The Pro Bono Brannon: Brannon currently has 100 pro bono hours this year. He seeks and performs work for the underprivileged typically going through divorce and custody proceedings. Having two adorable boys, he is passionate about securing the best result for the child(ren)."

– Sara Govero, Cosmich Simmons & Brown, PLLC

RISE to the Occasion: Brannon has successfully found and retained experts unwilling to testify for any other case or for any other lawyer, he has tracked down game-changing evidence to leverage case resolutions, and he has debilitated opposing witnesses through exhaustive questioning and opposing counsel in creative and unmatched motion practice.

Most recently, Brannon and his team secured the nation's first order remanding four (4) separate capital credit lawsuits back to state court after having previously been removed under the "Federal Officer" Removal Statute.



You Are the Succession Plan

By: Dr. Bradley W. Gronke, Talent Acquisition and Development Manager at Gallagher Bassett



Insurance opportunities are vast with over 400,000 positions needed to be filled by 2020¹. Many of these careers have been and will be filled by youthful individuals that are hungry to make an impact economically, socially, and organizationally. We as an industry need to focus on these areas in order to attract and retain talent in a lean marketplace. The unemployment rate nationally is at 4.0%². Essentially, everyone that wants a job has a job but how many are fulfilling their why³? How many of these individuals are passionate about the role they have? So many individuals that are employed wake up every day and say, “I have to go to work.” Instead, wouldn’t it be great if those same individuals could wake up and say, “I get to go to work.” Serving in the claims industry for nearly twenty years I have heard both of these statements from co-workers, employees, and managers. We need to address the desires of the intellectually bright, energetic, and motivated young executives of tomorrow, today!

Many talented young professionals are already starting their own businesses in high school or even earlier⁴. These amazing people, much like the individuals earning RISE awards, want to make an economic impact. They want to see our economy grow. They realize that the results of these efforts will ensure that they are developing a solid living legacy. Many professionals new to the insurance industry already have a solid foundational knowledge of business structure, root-cause analysis, and return-on-investment modeling. Professionals already possessing those skills allow organizations to focus on deep dives to technical aspects of roles. It also allows for exploration of an organization’s culture in a more expedited timeline than previously was ever imaginable. The value that is contributed by an individual to an organization needs to be felt. We need to ensure that they are aware of how they are making an impact and where they fit into the economic success of the organization.

The inclusion of individuals into the whole of an organization, from the smallest team to the largest corporation, comes through an awareness and acceptance of the culture. “There are no second class citizens – everyone is important and everyone’s job is important.” The fifth shared value of The Gallagher Way speaks to the necessary recognition of everyone in the organization. Diversity and inclusion are two words at the forefront of many organizations today, yet there is an insurance company where these words have been a part of their culture even prior to thirty years ago⁵. The retention of these diverse employees will perpetuate diversity as they are essential parts of

succession plans for the leaders of today. We as an industry need to continually think outside of the box, or perhaps even just get a different box, when it comes to engagement related to social purpose. Crowdfunding is a way to obtain that engagement of the cutting edge generation⁶.

The leaders of tomorrow need to focus on the changing structure of organizations. Many of these organizations are now flat and executives are more accessible than ever before⁷. The circular relationship between a leader and followers is foundational for flat organizations to thrive. The partner-follower is one that will passionately pursue the vision of the leader⁸. These followers will also leverage their intelligent disobedience to ensure that the organization moves from good to great^{9,10}. There is a distinct difference between leaders and managers. Leaders inspire, motivate, and drive others to success. Managers ensure that tasks are completed within given boundaries so that goals can be achieved. Each role, leader and manager, is important to an organizations overall success. The most exciting news of this most recent generation of young professionals is that there are more and more leadership talents and study to develop skills. Leadership is essential to organizations moving from good to great but the foundation of that leadership is the follower. Leaders must be willing and have the capacity to understand their followers if the organization is to succeed.

The RISE awards highlight young professionals that are the succession plan for our industry. We as current leaders need to take notice. We need to ensure that our businesses are supplying engaging opportunities for growth economically, socially, and organizationally to these young professionals. When we ensure that our industry is achieving the steps necessary to support its own movement from good to great we will be laying the foundation for the young insurance professionals of today to be tomorrow’s leaders.

Notes:
1.)Ruquet, M. E. (April 17, 2013). Insurance industry crisis: 400,000 positions to fill by 2020. Property and Casualty 360.
2.)Bureau of Labor Statistics. (July 6, 2018). The employment situation-June 2018 (USDL-18-1110). Washington, DC.
3.)Sinek, S. (2009). Start with why: How great leaders inspire everyone to take action. New York, N.Y.: Portfolio.
4.)Stach, L., & Winn Miller, Mary. (2014). Why high school students can start companies. Under 30 CEO.
5.)Gallagher, R. (May, 1984). The Gallagher way.
6.)Bourque, A. (March 29, 2016). Are millennials the most generous generation?. Entrepreneur.
7.)Vaccaro, A. (January 29, 2014). How do you lead in a flat organization?: Companies that eliminate formal hierarchies must also transform the role of their senior leadership. Inc.
8.)Chaleff, I. (2009). The courageous follower: Standing up to & for our leaders. San Francisco: Berrett-Koehler.
9.)Chaleff, I. (2015). Intelligent disobedience: Doing right when what you’re told to do is wrong. Oakland: Berrett-Koehler.
10.)Collins, J. (2009). Good to great: Why some companies make the leap...and others don’t. London: Random House.

LEADERSHIP TEAM

HINA SHAH

EDITOR AND INCOMING CHAIR
NATIONWIDE INSURANCE
COMPANY - RISK MANAGER

ALEX CLAY

DIRECTOR OF JOB LISTINGS
MAIN STREET AMERICA -
CLAIMS VENDOR MANAGER

KIMBERLY VAUGHN

DIRECTOR OF SCHOLARSHIPS
AMERISURE - AVP WORKERS’
COMPENSION CLAIMS

BEN ROSSER

CHAIR OF RISE LINKEDIN
GROUP
MMG INSURANCE - INSIDE
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CONGRATULATIONS!

to all of the RISE Award winners! Praxis is honored to support the recognition, recruitment and advancement of young professionals in our industry.

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