



Rising Insurance Star Executives



**3RD ANNUAL  
RISE AWARDS**

**GROWING, RECOGNIZING AND ADVANCING THE BEST NEW AND  
YOUNG PROFESSIONALS IN THE INSURANCE INDUSTRY**

2019 

# ABOUT RISE

## RISING INSURANCE STAR EXECUTIVES

Congratulations to all the winners of the third annual RISE Awards! Your peers, supervisors and industry colleagues have chosen you 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 twelve. We look forward to following you in your career as you progress and influence others to excel in this industry.



To everyone in the insurance industry: Thank you for supporting a professional organization dedicated to recognizing and advancing new and 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 to bridge the talent gap.

2019 marks our third year celebrating the success of our members. You can look forward to seeing more from RISE in the coming months. Please follow our LinkedIn and other social media platforms to stay updated on RISE news. If you haven't joined yet, hurry and do so soon (it's free) to have full access to the group, events, and scholarship opportunities.

Thank you to the RISE board for your valuable contributions and continued support. To my Co-Chairs Katerina Garavito and Chelsea Buzer, I attribute so much of RISE's growth and development this year to you both. Lastly, thank you to everyone who participated in nominating extraordinary professionals.

Congratulations again to all the winners, and let's make this our best year yet!

**Amy Cooper**  
Founder, RISE

### THE VISION

Our vision is to create a platform where young insurance professionals are recognized for their accomplishments, can learn about new industry technologies and practices, and are encouraged to engage with industry mentors and peers. We act as a springboard for rising stars while providing a knowledge transfer strategy to their employers. Our purpose is to educate the younger generations on the benefits of joining the insurance industry and to help bridge the talent gap by creating a space for young professionals to network, learn and grow.

### 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](http://RISEprofessionals.com)

## 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, 2019.

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.

# HONORING THE 2019

# RISE AWARD RECIPIENTS



**ANDREA DEFIELD**  
ASSOCIATE ATTORNEY  
HUNTON ANDREWS KURTH  
LLP

FLORIDA PAGE 7



**ASHLEY ROBITAILLE**  
RATING SUPERVISOR  
ACADIA INSURANCE

NEW HAMPSHIRE PAGE 9



**BRADLEY GRONKE**  
TALENT ACQUISITION &  
DEVELOPMENT MANAGER  
GALLAGHER BASSETT

ILLINOIS PAGE 11



**CANDICE ELLIOTT**  
PERSONAL INJURY CLAIMS  
MANAGER  
MEEMIC INSURANCE  
COMPANY

MICHIGAN PAGE 13



**CHELSEA FOWLER**  
CONSTRUCTION DEFECT  
TECHNICAL CLAIMS  
SPECIALIST  
LIBERTY MUTUAL INSURANCE

NEW HAMPSHIRE PAGE 15



**JEFFREY FOSTER**  
SENIOR CLIENT SERVICE  
SPECIALIST  
HYLANT INSURANCE

TENNESSEE PAGE 21



**JESSICA COLLEY**  
PROCUREMENT LEAD  
QBE NORTH AMERICA

GEORGIA PAGE 23



**KATY MURPHY**  
CASUALTY CLAIMS ADJUSTER  
THE MAIN STREET AMERICA  
GROUP

MASSACHUSETTS PAGE 25



**KELLY BEHRENS**  
SENIOR SPECIALIST  
VELA INSURANCE SERVICES

NEBRASKA PAGE 27



**NATHANIEL BRAND**  
TRIAL ATTORNEY  
SELECTIVE INSURANCE  
COMPANY OF AMERICA

NEW HAMPSHIRE PAGE 29



**PAYAL PATEL**  
SENIOR VICE PRESIDENT,  
E&O AND CYBER CENTER  
OF EXCELLENCE  
MARSH JLT SPECIALTY

NEW YORK PAGE 31



**SHERRIA WILLIAMS**  
INSURANCE DEFENSE  
ATTORNEY  
UNITED AUTOMOBILE  
INSURANCE COMPANY

FLORIDA PAGE 33

# Insurance: The Career That Can Take You Places If You Let It

By: Andreas Kleiner, President and CEO, American Modern Insurance Group, Inc.®



As a young professional, you may have landed in the insurance industry by complete accident. This, in fact, happened to me.

When Berlin was bidding on the 2000 Olympic Games, I was an engineer working feverishly on the design for several Olympic structures. Then Sydney, Australia won the bid and everything I had been working on collapsed. It made me think about my next career move and I saw an exciting job advertisement by Munich Re that fit my profile. I applied and then joined Munich Re as a fire engineer. I knew nothing about insurance but I thought, “if you don’t like it you can always move back to a full-fledged engineering job”.

Many years later, I am still in the insurance industry, and it has been one of the best decisions I have ever made. I have learned that this is an industry that can give you a world of opportunity – if you are open to it.

International insurance companies regularly have difficulties finding employees interested in taking an assignment in another country. A move like this is not for everyone. However, I would encourage you to consider taking the leap. Many times international opportunities

offer the chance to work in a smaller business unit that allows you to have a broader general management type role, gaining exposure to many different aspects of the business. This is of great importance for those interested in moving up the corporate ladder into an executive role. You must be well-rounded and well-versed to be considered for high-level positions.

I never expected to work abroad when joining Munich Re but in less than three years with the company I was offered the chance to go to Singapore and lead the establishment of a risk engineering operation for South East Asia. The move to Singapore and other countries helped my career progress in such a diverse way that it eventually led to my current position at American Modern.

Working abroad is not just about career growth. Working and living in a different country and learning about a different culture can also be a personally enriching and wonderful experience. It helps you to become more receptive and tolerant towards different ways of living. I met my wife in Singapore and made life-long friends while working and living in four different continents over the last two decades. And I hear from my two daughters that the greatest gift that we as parents gave to them is exposing them to life in different countries – in our case Singapore, South Africa, Germany and the USA.

Insurance is the sometimes accidental career that can take you around the world – but, only if you let it. If you have ambition, a desire to learn, and you’re open to new experiences, then consider international assignments and make it known that you are interested in these opportunities. Based on my own experience and the experiences that have been shared with me by other leaders, I don’t think you will regret saying “yes.”

# ANDREA DEFIELD

## 2019 RISE AWARD RECIPIENT



ANDREA DEFIELD  
ASSOCIATE ATTORNEY

HUNTON ANDREWS KURTH LLC

FLORIDA

HUNTON  
ANDREWS KURTH

Andrea has dedicated her career to helping clients manage risk and maximize insurance recovery. She adds value to business deals by advising clients on contractual risk transfer through indemnity, additional insured and required insurance provisions in contracts. She also helps clients identify and mitigate risk before a loss occurs by conducting insurance due diligence for mergers and acquisitions and audits of clients’ insurance programs to identify gaps in coverage before renewal. When a loss occurs or claims are made, Andrea helps clients maximize insurance recovery by advising them through the claims process.

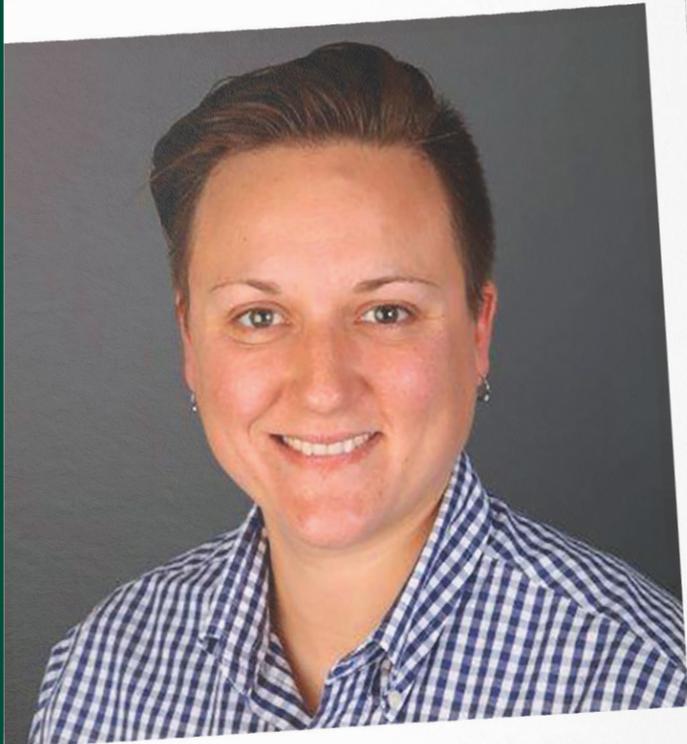
*“Over the last year, Andrea excelled in her representations of clients in high-stakes, high-profile insurance matters as well as her involvement in pro bono work on behalf of hurricane victims. She is as skillful as they come; her breadth of knowledge is impressive, and she continues to grow as a lawyer. She truly is an insurance superstar.”*

– Walter Andrews, Insurance Litigation  
Partner and Insurance Litigation Group Head,  
Hunton Andrews Kurth LLP

She organized and led a free call-in webinar for local disaster relief workers, government workers and attorneys in the aftermath of Hurricane Harvey (and did so while she was evacuated from her own home because of Hurricane Irma). She also created the ABA’s first disaster response resource page that was open to the public and created free content for the page such as insurance claims checklists and other free resources for the public. She also worked with community organizations, insurers and other attorneys to obtain additional content and resources for victims of the several hurricanes and wildfires and disaster response workers. Andrea is a true student, and teacher, of insurance. She is a prolific author and lecturer on insurance and risk management topics including directors and officers (D&O), private equity, cyber, food recall, liability, pollution, windstorm and other insurance issues.

# CONGRATULATIONS

to 2019 RISE Award Recipient:



## ASHLEY ROBITAILLE

with sincere appreciation  
from your colleagues at  
Acadia Insurance!



| a Berkley Company

*Closer Coverage<sup>SM</sup> means  
more value, delivered  
with a personal touch.*



MAINE | CONNECTICUT | MASSACHUSETTS  
NEW HAMPSHIRE | NEW YORK | VERMONT

ACADIAINSURANCE.COM  
800.773.4300



# ASHLEY ROBITAILLE

## 2019 RISE AWARD RECIPIENT



ASHLEY ROBITAILLE  
RATING SUPERVISOR  
ACADIA INSURANCE

NEW HAMPSHIRE

Ashley is one of the most compassionate and passionate young insurance professionals in the industry. She consciously devotes herself to becoming a better manager every day, and to building a better company for all her co-workers. She has volunteered innumerable hours participating on two separate internal innovation projects aimed at bettering Acadia Insurance as an industry player, employer and community member. Her dedication to her team is most impressive though. Ashley can often be seen standing in the cube of a team member, explaining a process or helping someone sort through a thorny problem, almost always with an easy laugh and a smile on her face. She embodies humility, openness, flexibility, empathy and loyalty to the insurance industry.

*“Ashley has a unique ability to effectuate positive change in those that she works with. She consistently develops her staff, preparing them not only for success in their roles but also as future leaders themselves. She leads by example and continuously looks for ways to improve the status-quo.”*

*-Andrew Portwine, Managing Director, Rating and Audit for Acadia Insurance*



To Ashley, her greatest successes are team members who get promoted or recognized, and she is the last to ever take any credit for the impressive results turned in by the Rating Department. Ashley is an important and integral member of Acadia's community who understands that customer service is just as important internally as it is externally. One of her largest contributions to the industry is that she is taking fresh-out-of-college graduates and getting them excited about being in the insurance industry. She stands out amongst her peers because she takes the time to meet individually with each member of her team in order to help them choose a behavior on which to focus which would help support innovative thinking goals. She is now working on helping each team member find resources and materials which will assist them in learning about, refining and practicing their individual behavior choice.



# Industry Recognition AWARD



**Dr. Bradley Gronke**  
Talent Acquisition &  
Development Manager



## Congratulations to Dr. Bradley W. Gronke, EdD, for receiving the 2019 RISE Award!

Dr. Gronke is responsible for recruitment, training/ development, and engagement/ retention at Gallagher Bassett, where he serves as a Talent Acquisition and Development Manager. He proudly mentors leaders for succession planning at all levels of the company. Bradley's team is cultivating a stream of highly talented professionals that will continue Gallagher Bassett's journey to deliver superior outcomes. A results driven, motivating worker's compensation claims leader with 18 years of experience and credentials, Bradley holds MS, MBA, and EdD degrees. He also holds professional designations of AIC, AIS, AIM, and SCLA and is pursuing his CPCU designation. He maintains a Lead Instructor status and CPR Instructor certification while having served as an EMT for more than 19 years. Bradley is a valuable part of the GB team whom epitomizes care and compassion for the whole person.

Why? Dr. Gronke says it best himself: "A calling answered every day, through every contact, every patient, every person experiencing a

trauma in their life needs love, needs understanding, needs kindness. My father taught me to ensure the people that I lead are the most important people in the entire world because someday, if I'm successful, they will lead me. Being charged with a mission of finding the brightest stars in our industry that are the most compassionate individuals in our industry, and then molding them to be the catalysts for tomorrow's innovative solutions to problems we have not even dreamed of yet is the greatest journey I have ever been on... and I am just getting started."

Since joining the department in October, 2017, Dr. Gronke's contributions include:

- 261 Hires
- 203 Experienced Pipeline Candidates
- 118 Trainee Pipeline Candidates
- 22 WC Trainee's Facilitated through Foundations Program
- 110+ Students as Adjunct Business Faculty with 4.5+ Student Rating and 9.5/10 Faculty Rating

We go beyond expectations in the continuous pursuit of a better way.

# BRADLEY GRONKE

## 2019 RISE AWARD RECIPIENT



**BRADLEY GRONKE**  
TALENT ACQUISITION &  
DEVELOPMENT MANAGER  
GALLAGHER BASSETT

ILLINOIS

Bradley is constantly striving for excellence through action research that is practitioner based. Dr. Gronke holds the professional designations of AIC, AIS, AIM, and SCLA while currently pursuing his CPCU. Dr. Gronke serves on the faculty at Benedictine University as an adjunct lecturer. He has volunteered since 1999 as an emergency medical technician. He holds numerous instructor and practitioner certifications in first response. Dr. Gronke's why is to impact society in perpetuity by sharing the study of followership with others.

*"I have had the pleasure of working with Dr. Brad Gronke over the past few years in his role as Talent Acquisition and Development Manager. Brad has been instrumental in working with our young professionals, helping to promote our industry, developing career pathways and fostering learning to our Resolution Professionals. He is an inspiration to those that he comes in contact, always with a positive spirit and true professional."*

*-Patricia Barber, Vice President Talent Acquisition & Development, Claims Operation,*

*Gallagher Bassett*

By way of his actions, and what he had attained, Brad serves as a role model for others in the insurance industry to aspire to. He is the consummate professional always ready and willing to provide assistance to those needing his help. Gallagher Bassett has been hiring individuals who are "new" to the insurance industry by way of Gallagher Bassett University. An important element of this process is the necessary on-boarding training. When other members of Brad's team were not taking on this responsibility, Brad made sure this training was conducted for not only the folks he was responsible for; but all other new folks who had not undergone the on-boarding training process.



# What Is Your Plan For Change?

By: Stephanie Behnke, Vice President, Claims Strategy and Business Solutions at The Hanover Insurance Group, Inc.



Everywhere we turn, we see that our industry is changing... rapidly. For the most part, we look forward to the evolution of digital technology, artificial intelligence and more insightful data analytics. For every new technology we deploy, there is a ripple effect through our organizations that is easily overlooked. While change is constant, and we're warned to prepare our teams for it, we often don't hear how we should prepare, nor do we make change an intentional and measurable part of our projects. When we manage change well, we remove uncertainty, anxiety and fear. We empower our teams to safely challenge, question, and adapt to what is happening around them. Regardless of the change management technique you select, the data is clear; projects that include change management as a part of project discipline are up to 40% more likely to succeed. Now that we've established that change management is critical, how do you get started?

All change management has one thing at its center: People. To succeed with any initiative, it is important to recognize where your team currently is, and where you're asking them to go. Does the project touch one part of your organization or many? Will there be downstream consequences to other teams? Are you changing a core capability or just augmenting it? Knowing how significant the change will be for your team

drives the program itself. Small changes require less rigor, and significant changes require more frequent one-on-one employee interactions.

A quick change readiness assessment before a kickoff can help managers gauge the receptivity of their organization and identify any gaps in skills, knowledge or interests. Since research suggests it takes 66 days to form a habit, be sure your plan allows team members enough time to become acquainted with the new tool or process, and plenty of time to practice new skills. Setting up a test environment is a great stress-free way to introduce new technology.

Wherever possible, pilot teams should be established to help build change champions. Posting adoption metrics can generate enthusiasm and create friendly competition while focusing teams on a common goal. Finally, rewarding adoption and sponsorship should be used to incentivize teams to continue good habits.

To get the most value from your change management program, integrate it into your overall project plan by including and tracking key milestones and metrics. The objectives and success factors that you publish set the tone for the project and put a focus on results. Just bringing discipline to your process can help increase visibility and remove uncertainty.

Using a mature change management discipline, such as the AD-KAR® Method, may help your teams stay informed of what is changing and why, while creating an enthusiasm and desire for change. It also helps to ensure the right training has been deployed and test your organization's abilities long before deployment. Finally, this method helps establish reinforcement programs that reward team members for embracing change.

So, before you launch that next project, ask yourself "What's my plan for change?"

# CANDICE ELLIOTT

2019 RISE AWARD RECIPIENT



CANDICE ELLIOTT  
PERSONAL INJURY CLAIMS  
MANAGER  
MEEMIC INSURANCE  
COMPANY  
MICHIGAN

Candice is a young, vibrant manager that has transformed and overhauled her department. She is a very effective leader and is highly respected among the members of her team. Even at a young age, she has shown wisdom in resolving disputes between employees and management. She leads by example and continually expresses optimism in the face of any obstacle.

As a woman and an ethnic minority in management she has attended several events planned by the Meemic Foundation and Detroit Public Schools to show young girls that they can pursue management positions in the insurance industry.

*"Candice possesses essential leadership traits. She faces problems and/or obstacles with confidence and assurance. Candice steadily leads her team with authority and respect. She readily creates an environment where all employees feel valued, respected and trusted. She is a valued leader within our organization."*

– Dominique Stalling, Director of Claims, Auto Club Group

Early in her management career, she encountered a dispute between two employees with far more seniority than her regarding a management decision that she was forced to make. She brought the employees in and explained to them that she understood their frustration and gave them the rationale behind the decision then reassured them that she and the other managers would use their feedback to fine tune the decision making process. These two employees became very valuable members of her team because they were impressed with the way she handled their feedback.



# The Rise of the Champion

Entrepreneur.  
Intrapreneur.  
Champion.  
**Which are you?**



**One way to be an effective leader in any organization is to have an entrepreneurial mind and spirit.** That can easily be summarized as “thinking outside the box,” as well. It doesn’t mean you have to go start your own company. After all, that is extremely risky, and we are all in the risk (mitigation) business!

So, if you have that entrepreneurial spirit, you can put it to work within your company being an “intrapreneur.” It’s fun to find new business opportunities, new products, and new solutions that add value to the company.

There is a third route that is often underappreciated: the route of the champion.

A champion is someone within the organization who identifies a product, service, vendor or other tool that can help the company. The benefit of being a champion is that it is low risk but still has huge upside for your career.

Your colleagues in vendor management and sourcing are always looking to find new products, services and tools to champion, but there’s no reason you can’t also be a champion. You know first-hand what tools would be truly helpful in your day-to-day duties, so you are in a great position to be an effective champion!

My advice is dig deep within your area of expertise and see what product, services, and tools that are out there which can make your job easier and add more value to the company.

**Congratulations to all of this year’s Champions and may we all continue to champion great causes!**

Sincerely,  
Jon Broder

Being a  
**champion is**  
low risk and a  
**huge upside**  
for your career

## CHELSEA FOWLER

2019 RISE AWARD RECIPIENT



CHELSEA FOWLER  
CONSTRUCTION DEFECT  
TECHNICAL CLAIMS  
SPECIALIST  
LIBERTY MUTUAL INSURANCE  
NEW HAMPSHIRE

The bigger the challenge, the bigger the opportunity. She consistently rises above the occasion when it comes to volunteering for projects and assignments and is the first person to reach out to a fellow team member to help and assist in any way possible. She thinks others first which is a remarkable quality. Chelsea has quickly ascended in her role with Liberty in CD, but more than that she has formed trust bonds with her team and those outside of her team in cross functional projects.

Chelsea’s nature is to be inquisitive and ask questions, but she is thoughtful about her approach, seeking others input and not just asking for the sake of asking, but asking deeper and insightful questions which provokes thoughts and discussion rather than just seeking an answer, she seeks to understand and for others to join her in this process.

*“Chelsea is a rising star in our organization because she sees every challenge as an opportunity. The bigger the challenge, the bigger the opportunity.”*

– Tom Gesner, Claims Manager,  
Liberty Mutual Insurance

Chelsea recently was awarded the “Unsung Hero Award” in her department of roughly 60 people. This award is presented to an individual who goes above and beyond to make others better. Her team was recently received recognition as the Top Team in our department because of people like Chelsea who unselfishly think about others first. Chelsea has received numerous “Bravo Awards” and “Spotlight Awards” recognizing her participation in a variety of Projects and was recently a leader in working through some kinks revising a current claims operating system.



### Flat Rates for Routine Hearings

VortexLegal’s nationwide network of qualified attorneys attend routine hearings on behalf of staff counsel and panel law firms.

**No hourly fees. No travel expenses.**

# INSURANCE EXECUTIVES

## A week in the life of...

Everyday professionals across the insurance space take on daily routines to balance home and work. New professionals often wonder how they too will learn to balance their lives while entering the workforce.

Join us as we walk through a day in the life of these accomplished professionals



2019

Monday	Tuesday	Wednesday	Thursday	Friday
				
<b>Adena Edwards</b> Assistant Vice President Environmental & Crisis Management Claims Starr Adjustment Services, Inc.	<b>Regina Cedeno</b> Resolution Lead Blackboard Insurance	<b>Gracemarie Mende</b> Claims Manager Arch Reinsurance Company	<b>Stacey E. Jurado</b> Claims Casualty Manager Atlas Financial Holdings, Inc.	<b>Deborah Saunders</b> Senior Director, Claims Management Comcast NBCUniversal

FOR THE FULL LENGTH INTERVIEWS, GO TO [WWW.RISEPROFESSIONALS.COM](http://WWW.RISEPROFESSIONALS.COM)

## A WEEK IN THE LIFE OF



*What do you do when you walk into the office?*

The first thing I do is grab a cup of Bustello coffee and a KIND bar. I recommend the almonds & coconuts KIND bar. Then, I look at my emails.

*Who do you work most closely with and what does your role look like?*

At the office I work closely with my Chief Claims Officer and my direct counterparts. I supervise and oversee the claims being handled by our Third-Party Administrator, consisting of 15-20 adjusters. Prioritizing at work is very critical. Ongoing handling of situations never ceases. Generally, priority hinges on the level of severity. I prioritize problem solving first, followed by critical emails and team meetings.

*Do you eat in the office or do you go out for lunch?*

I prefer to dine out at a restaurant with colleagues and friends, but at times meetings keep me in for lunch.

*What time do you wake up and how do you get to work?*

Around 6:45 am. My morning consists of about a 45 minute drive to work. Throughout my career thus far, I've experienced the worst and the best commutes from as short as a 20 minute drive to as long as an hour and a half train and car ride one way on unreliable mass transportation.

*What is the first thing you do at the office?*

I find myself dropping my coat in the same spot, logging on and immediately jumping into emails. Half the time it's over an hour or so later when I pick my head up and realize I need water, breakfast, and a bathroom break.

*Who do you work most closely with at work?*

In this role, I work closest with a number of TPA firms and adjusters. My job requires supervision and oversight of the firms, programs handled, and individual assigned adjusters. However, part of my job is collaborating with the other departments like Operations, Compliance, Legal, Finance and Underwriting.

*What does most of your day look like?*

From morning hours through mid-day, most of my time is spent diffusing situations, resolving questions and concerns, and dealing

*What changes in the role of technology have you noticed in the workplace?*

Technology is now firmly entrenched in the insurance industry. It has enhanced the access to information so that almost everything is available in a paperless environment. Also, technology allows individuals to work remotely, yet communicate instantaneously with co-workers, clients, brokers, policyholders, etc.

*What is the most rewarding part of your job?*

The most rewarding part of my job is resolution--being able to resolve an issue or matter, where all parties are satisfied and agreeable to the resolution.

*What is life like back at home?*

At the end of my work day, I look forward to two smiley faces waiting at the door, calling me, "mommy". They are the biggest motivation in my life along with my husband--my family motivates me to get up every day to endure the long commute to work.



with the last-minute emails not addressed from the night before. Once my morning emails are done though, I find myself able to actually supervise and monitor the claim files being handled. Of course, all of this only applies IF there are no meetings scheduled. By mid-afternoon though, I've tried to set that time for meetings, projects, and closing out the needs of others, unless that's the project I'm working on. By closer to 4:4:30, I circle back to the outside world and begin closing out emails and calls for the rest of the day.

*Who is home waiting for you at the end of your day?*

I'm blessed to be married for the last almost 2 years to my husband. Our children consist of 2 fluffy big brown dogs and a bossy cat. All of whom require an excessive amount of attention when I get home.



## LEADERSHIP TEAM



**AMY COOPER**  
FOUNDER



**KATERINA GARAVITO**  
CO-CHAIR



**CHELSEA BUZER**  
CO-CHAIR

## 2019 RISE ADVISORY BOARD



**ABEL TRAVIS**  
VICE PRESIDENT,  
UNDERWRITING & INNOVATION

AF GROUP



**ALAN BRYAN**  
SENIOR ASSOCIATE GENERAL  
COUNSEL

WALMART



**DALE SHERMAN**  
VICE PRESIDENT AND ASSISTANT  
GENERAL COUNSEL

ALLSTATE INSURANCE



**DANIEL COLON**  
VP OF OVERSIGHT

UNITED AUTOMOBILE  
INSURANCE COMPANY



**JOHN SARGENT**  
DIRECTOR, SPECIAL  
INVESTIGATION UNIT

METLIFE AUTO & HOME



**KEN KERBY**  
MANAGER SPECIAL INVESTIGATIONS  
UNIT AND CLAIMS AUDIT

THE CINCINNATI  
INSURANCE COMPANIES



**LAURA JOHNSON**  
VP, UNDERWRITING AND  
PRODUCT DEVELOPMENT

OLYMPUS INSURANCE  
COMPANY



**MARGARET SHERLOCK**  
VP, REGIONAL DIRECTOR, STAFF  
COUNSEL

SELECTIVE INSURANCE



**MATTHEW MCCOLLEY**  
CHIEF CLAIMS OFFICER

BERKLEY HUMAN SERVICES



**SCOTT OTTENHEIMER**  
VP - HEAD OF PROCUREMENT

QBE NORTH AMERICA

## RISE AMBASSADORS

**JIM ABBOTT**  
EVP

PROVENCER & COMPANY

**SARA GOVERO**  
DIRECTOR OF CLIENT RELATIONS

COSMICH SIMMONS & BROWN

**MICHAEL SALTMAN**  
CHIEF REVENUE OFFICER,

RESOLUTE SYSTEMS

**RICH DOWD**  
REGIONAL VICE PRESIDENT – CLAIMS

ATLAS FINANCIAL HOLDINGS

**MICHAEL LAFOND**  
DIRECTOR OF CLAIMS LITIGATION

PEKIN INSURANCE

**CARYN SIEBERT**  
VICE PRESIDENT – CARRIER PRACTICE

GALLAGHER BASSETT

**BRIAN POZZI**  
VP OFFICE OF GENERAL COUNSEL  
& CORPORATE CLAIMS OFFICER  
THE AUTO CLUB

**BRYAN FALCHUK**  
HEAD OF CUSTOMER

HI MARLEY

## SCHOLARSHIPS

Through our partnerships with organizations across the insurance industry, RISE is proud to offer scholarship opportunities, in addition to discounts, for its members to attend industry conferences. RISE is free to join, and once you are logged into our site as member you will see upcoming events and be able to apply for scholarships to attend for free.



IASIU IS GIVING AWAY 5 SCHOLARSHIPS TO RISE MEMBERS! JOIN US  
SEPTEMBER 8<sup>TH</sup> FROM 5-6PM  
FOR A RISE/IASIU NETWORKING RECEPTION. MADE POSSIBLE IN  
PART BY METLIFE AND GEICO  
FOR MORE INFORMATION GO TO  
[RISEPROFESSIONALS.COM/2019-IASIU-SCHOLARSHIP/](http://RISEPROFESSIONALS.COM/2019-IASIU-SCHOLARSHIP/)



INSURETECH CONNECT  
SEPTEMBER 23-25, 2019 // MGM GRAND, LAS VEGAS  
INTURETECH IS PROVIDING 10 SCHOLARSHIPS TO  
RISE MEMBERS! FOR MORE INFORMATION GO TO  
[RISEPROFESSIONALS.COM/INSURETECH-CONNECT-  
SCHOLARSHIP-APPLICATION/](http://RISEPROFESSIONALS.COM/INSURETECH-CONNECT-SCHOLARSHIP-APPLICATION/)

## UPCOMING WEBINARS

Register Online

### Followership

August 23 @ 12:00 pm - 1:00 pm EST

Leadership is a hot topic in the world of organizational behavior. Many of today's leaders are uber technicians that have been promoted for their superlative technical skill set however are unprepared to lead others to reach their goals. Gaining a clear understanding of the concept of followership will aid future leaders and current leaders alike with leveraging these relationships in the most effective ways possible.

### Ethics in Claims Handling (CE/CLE)

September 20 @ 12:00pm – 1:00 pm EST

Join us for a one hour ethics credit defining ethics and discussing the key ethical principles that every claims adjuster and litigation professional needs to know through the use of real life case studies.

## 2019 WEBINAR SPEAKERS

**Professionalism in 2019** by James Lacey, Vice President of Claims, MedMal Direct

**There's A Policy For That!** by Kate Browne, SVP, Swiss Re

**The Benefits Of Using Your Legal Degree For A Career In Claims**, by Ronald Mazariegos, VP of Claims and Vendor Management, Arrowpoint Capital

**Interviewing Insights – Being a Better Interviewer and Interviewee**, by Dale Sherman, Vice President of Claims, Allstate Insurance Company

**Panel: How To Specialize In Insurance**, by:

Adena S. Edwards, Assistant Vice President, Environmental & Crisis Management Claims, Starr Adjustment Services, Inc.

Michael J. Aberle, Senior Vice President, CannGen Insurance Services, LLC

Tom Gesner, CRIS, Claims Manager, Liberty Mutual Insurance - Global Retail Markets U.S. Casualty Claims

Anthony J. Dolce, Esq., CIPP/US, Vice President, Cyber Lead, North American Financial Lines Claims, Chubb

[If you missed any of these webinars, check out our YouTube for recordings](#)

TOP NATIONAL INSURANCE RECRUITERS



Experience the Insure National difference and build the team your customers deserve.

**CONGRATULATIONS TO THE 2019 RISE AWARD WINNERS!!**

[www.Insure-National.com](http://www.Insure-National.com)

# JEFFREY FOSTER

2019 RISE AWARD RECIPIENT



**JEFFREY FOSTER**  
SENIOR CLIENT SERVICE  
SPECIALIST  
  
HYLANT INSURANCE  
  
TENNESSEE

Jeffrey operates at 110% at all times. He is the first one in and the last one out every single day, working as long as it takes to get things done. He is dedicated to serving his team and dedicated to the Hylant mission. He is smart, always eager to better himself and learn. He is also compassionate and caring, always providing his coworkers with support or a listening ear. He is the youngest person in his office by over a decade but he doesn't let that stand in the way of him trying his best every single day.

Jeffrey volunteers in semi-annual neighborhood clean-up days and the salvation army angel tree project annually.

*"Jeffrey never stops learning, he is always learning from those around him, improving his skills and finding new solutions to old problems."*

*– Danielle Dedrick, Client Executive,  
Hylant*

Jeffrey is always encouraging young people who have a passion for either business relations or law to consider insurance. He is always mentoring his younger peers, helping them get involved in networking events and professional development



# Taking Charge of Your Career

By Dan Franzetti, Chief Operating Officer, QBE North America



With the advent of many new technologies and rapidly evolving threats such as cyber, the insurance industry is a very dynamic place to be. In my 25-plus years in the business, I can't think of a more exciting time. The industry needs new leaders. There's a large cohort of senior leaders set to retire in the next decade. Replacing them is a significant industry issue.

Given this backdrop, young insurance professionals have a tremendous opportunity to rise and steer their careers in directions they will find stimulating, challenging, and rewarding. But it is not one that can be taken for granted. The old days of doing a great job in your current position and expecting the company to notice you and hand-hold your way up the career ladder have long gone. In fact, I'm not sure they ever existed.

I recall a point more than 20 years ago when I asked a senior executive about my career and what he and the company were thinking. His response was a mildly rude surprise. He said he was paying little attention to my career. He said when he woke up and took his shower every morning, he was contemplating his career and professional development and what his next moves should be. He advised me to do the same for myself.

While I was taken aback at the time, I took his advice. From then on, I redoubled my efforts on plotting my career path, setting goals, and deepening and broadening my capabilities. Now I owe him a debt of gratitude.

The approach that has worked for me starts with thinking about the job I want to be doing two to perhaps five years in the future. Sometimes, this is the hardest part because there's no objective right or wrong answer. To make the decision, it helps to have relationships with people in a broad set of areas and levels who can give you perspectives.

Once I have decided the job objective, I think about the skills and relationships I need to achieve it. The relationship part is very important. That's how you inspire people to teach you the skills and think of you when the right job becomes available. I then write down in detail a plan and timetable for acquiring the skills and relationships. Holding yourself accountable is key. I assess my progress every month.

Progress often requires moving laterally instead of up so that you learn and gain perspectives that will eventually help in higher positions. In my career, I've moved laterally as often as upwardly.

While you can't expect your company to take responsibility for your career, you should look for ones that provide the environment for you to grow. For instance, at QBE we provide tools and training for employees to create their development plans and encourage regular sessions with their managers to discuss progress and possibilities. A willingness to take and act upon constructive feedback is the best way to grow. The insurance industry holds great promise for young professionals, and by taking charge of your development and growth, you can have a very long and rewarding career.

# JESSICA COLLEY

2019 RISE AWARD RECIPIENT



JESSICA COLLEY  
PROCUREMENT LEAD  
QBE NORTH AMERICA

GEORGIA

Jessica has been an outstanding contributor to and leader of her team for a number of years. She is constantly looking for ways to increase efficiency and drive customer satisfaction through her work on the Procurement and Analytics Team. She has established herself at a very young age professionally, as a trusted advisor with QBE stakeholders, and has built credibility with her external vendor partners as well with her data driven approach.

*"Jessica has been an invaluable member and leader of our Procurement team here at QBE. In addition to her considerable analytical ability, she has also been at the forefront of researching and identifying opportunities to add value through the latest innovations and technology, with a consistently demonstrated ability to think outside the box and develop consensus among both team members and stakeholders. She is a fantastic team member, mentor and thought leader and we are thrilled to see her recognized with this great honor."*

*– Joe Stamps, AVP Claims Procurement,  
QBE North America*



Jessica has been a leader and a pioneer in developing methods to drive improvements in the procurement processes for QBE that measure far more than just reductions in price, as one typically sees in much of the industry today. Jessica led the drive to create the first spend cube for QBE across Claims, Underwriting, IT and Indirect spend categories. At that time, she was in the relatively junior position of Senior Analyst, but still took the initiative to coordinate the data collection and analytics efforts and produced a comprehensive, accurate spend analysis that earned praise from senior executive leadership at QBE. She has received two promotions in just 3 and a half years and is on a fast track to continue to advance through innovative analytical techniques and relationship building that has seen her become a trusted advisor throughout QBE at a very early stage in her professional career.

## OFFICES

BAY ST. LOUIS, MISSISSIPPI  
COVINGTON, KENTUCKY  
GRAND RAPIDS, MICHIGAN  
HATTIESBURG, MISSISSIPPI  
JACKSON, MISSISSIPPI  
NEW ORLEANS, LOUISIANA  
PITTSBURGH, PENNSYLVANIA  
SCOTTSDALE, ARIZONA  
ST. LOUIS, MISSOURI

## LICENSED TO PRACTICE

ALABAMA  
ARIZONA  
COLORADO  
CONNECTICUT  
DISTRICT OF COLUMBIA  
GEORGIA  
IDAHO  
ILLINOIS  
KENTUCKY  
LOUISIANA  
MICHIGAN  
MISSISSIPPI  
MISSOURI  
NEW YORK  
OHIO  
PENNSYLVANIA  
TENNESSEE  
TEXAS  
WEST VIRGINIA

## PRACTICE AREAS

APPELLATE  
COMMERCIAL LITIGATION  
CONSTRUCTION  
CONTRACT MANAGEMENT  
CORPORATE INVESTIGATIONS  
E-DISCOVERY  
LABOR & EMPLOYMENT  
LITIGATION SUPPORT SERVICES  
MASS AND TOXIC TORT  
PHARMACEUTICAL LITIGATION  
PREMISES LIABILITY  
PRODUCT LIABILITY  
TORT AND INSURANCE LITIGATION  
TRANSPORTATION



# CS&B

COSMICH SIMMONS  
& BROWN, PLLC  
*Attorneys & Counselors at Law*

WE WANT TO CONGRATULATE ALL OF THE

*RISE AWARD RECIPIENTS  
CLASS OF 2019*

FOR THE RISING INSURANCE STAR EXECUTIVES.

CONGRATULATIONS!

KNOWLEDGE, TEMPERED BY EXPERIENCE

[www.cs-law.com](http://www.cs-law.com)

# KATY MURPHY

2019 RISE AWARD RECIPIENT



KATY MURPHY  
CASUALTY CLAIMS ADJUSTER  
THE MAIN STREET AMERICA  
GROUP

MASSACHUSETTS



Katy started her insurance career in the Customer Care Unit with no prior knowledge of claims or insurance. She stood out as very energetic, motivated and driven and was quickly promoted to the Auto Physical Damage Unit where she remained for 3 years. Katy was then promoted again and transferred to the Auto Bodily Injury unit, handling injury claims resulting from an automobile accident. Shortly after, Katy was sought after to transfer into the General Liability unit where she has been handling extensively complicated high exposure claims. She is thorough in her investigation and never cuts corners.

*“I have had the pleasure of working with Katy, for quite a few years, watching her grow from an incoming claims trainee into a successful General Liability Representative, handling high exposure complex claims. Throughout her young career, Katy has remained positive, driven and eager to continue growing within the industry. Katy is always smiling, ready to tackle any challenges she may encounter throughout the day.”*

*– Nira Malka-Karlon, ADP Claims Manager,  
Main Street America Group*

Katy always remains a positive team player and is always eager to advance her learning and career path. Katy just completed her Associates degree (while working full time) and will be enrolling in college courses to pursue her Bachelor's degree. Katy volunteered for United Way fundraising and encouraging co workers to sign up and help. Katy provides excellent customer service to every insured and claimant. She maintains professional attitude even during challenging times. She volunteers to train new hires and remains their coach and support long after the training period ends. Katy selflessly put her work and obligations on the back burner while assisting a struggling team member.



# Congratulations to Kelly Behrens on her selection as a 2019 RISE Award Recipient.



**Kelly Behrens**  
Senior Claims Specialist  
Vela Insurance Services

## KELLY BEHRENS

2019 RISE AWARD RECIPIENT



**KELLY BEHRENS**  
SENIOR SPECIALIST

VELA INSURANCE SERVICES

NEBRASKA

Kelly is cognizant of the industry's need for younger claims handlers to not only join the industry, but to take an active role in the development and growth of the industry. Kelly is relentless in her efforts to recruit and encourage younger claims handlers to take an active role in the industry and develop programs to train and advance these individuals. She is the Pied Piper of industry's youth and their development and advancement in the industry. Kelly never takes the easy way out. She is relentless in her efforts to find the proper result. While young in age, her experience and work ethic ranks her up with some of the best claims handlers in the industry. This tireless effort and determination, combined with her incredible intellect, has resulted in outcomes that is beneficial to both her employer and her insureds.

*"I could tell from the start she was smart, inquisitive and well organized. She now handles very complex matters and is extremely well versed in the industry and is meticulous in her case handling. Kelly is tough but fair and is always very knowledgeable and on top of her cases. Kelly is where she is today because of her hard work and perseverance."*

– **Christine Burkhart, Partner**  
**Wilson Elser**



A Berkley Company

Kelly is, above all else, dedicated to exceptional professionalism. She continually seeks to promote career development not only for herself but also new claims professionals. Specifically, she is interested in mentoring young women in the construction litigation field and is committed to bettering the image of claim and litigation management fields. She is the consummate professional. She carefully balances the interests of her insureds and strives to always keep them apprised of what's going on. She takes the time to allay their fears and explains the process.

*"Kelly's knowledge, skill, and passion for construction defect claim handling is remarkable. She is truly an asset to our Vela Claims Team. Congratulations to her on being chosen for this award!"*

– **Wendy Hultman, Litigation Manager,**  
**Vela Insurance Services**





## CONGRATULATIONS TO OUR VERY OWN NATHANIEL BRAND ON HIS 2019 RISE AWARD!

SELECTIVE IS PROUD TO RECOGNIZE NATHANIEL AND YOUNG TALENT IN THE INSURANCE INDUSTRY.



© 2019 Selective Ins. Group, Inc., Branchville, NJ. Products vary by jurisdiction, terms, and conditions and are provided by Selective Ins. Co. of America and its insurer affiliates. Details at [selective.com/about/affiliated-insurers.aspx](http://selective.com/about/affiliated-insurers.aspx). INST-19-025



## Congratulations to Payal Patel and all 2019 RISE award winners.

Marsh is passionate about advancing the careers of young professionals and recognizing talent at all levels of our organization. Payal's commitment to delivering client excellence and skills in leading complex cyber placements truly make her a rising star and dynamic role model for the next generation of insurance talent.



[marsh.com](http://marsh.com)

Marsh is one of the Marsh & McLennan Companies, together with Guy Carpenter, Mercer, and Oliver Wyman. Copyright © 2019 Marsh LLC. All rights reserved. 374419424



# NATHANIEL BRAND

## 2019 RISE AWARD RECIPIENT



NATHANIEL BRAND  
TRIAL ATTORNEY

SELECTIVE INSURANCE  
COMPANY OF AMERICA

NEW HAMPSHIRE

Upon commencing his employment at Selective, Nathaniel embraced the opportunity to handle a significant caseload on his own while leveraging the relationships with the bench and bar he had honed. The relationships were significant since Nathaniel's reputation was built on exceptional case preparation, deep knowledge of the law and inspirational poise in the courtroom. Incredibly, Nathaniel has great humility and takes nothing for granted. He approaches each day as a new challenge and, in my opinion, makes the world of litigation a more civilized and professional place within which to work.

*“Nate Brand is well deserving of this award. His intellect, work ethic and talent makes him not only an asset to our office but to the industry as a whole.”*

*– Jill Flynn, Esq., Senior Trial Attorney,  
East Hanover Staff Counsel for Selective Insurance*

Nathaniel is a team player, putting his heart and soul into his colleague's cases as well as his own. Despite the long hours he works and the young family he goes home to, Nathaniel never hesitates to do legal research for others, help out with appearances for others and take on stretch assignments for the betterment of Selective.



# What Does It Take To Get Your Career On The Fast Track?

By: Lance Ondrej, Chief Claims Officer & EVP of Claims



There are two common questions young professionals often ask. “What does it take to be a successful claims professional?” and “What do leaders look for when evaluating talent for succession plan purposes?” Although the two questions are distinctly different, the answers to both questions provide the secret sauce to a great career.

## The Day to Day

The claims environment is fast paced and rewarding. Most seek opportunities in the claims discipline in order to help others at a time when they need their insurance providers most. That said, it can be a challenging environment when the pace is combined with customer emotions and the inconvenience of having a loss. Although it may sound very basic, it is extremely critical for one to approach any claims role with an emphasis on developing a consistent routine. This helps to drive efficiency and confidence during the peaks and valleys of work demand. The claims environment suits those looking to avoid a job where the clock doesn't seem to move fast enough. Adjusters are expected to maintain an open inventory of losses and also receive new claims each day. Being able to adjust to changing priorities and the unexpected is a very important skill to perfect for an adjuster. When something goes wrong in a person's life, there is often a feeling of regret, anxiety or

even anger. It is common for those involved in an insurance related loss to display the same emotions. As a result, successful insurance professionals are able to personalize the claims experience in order to develop trust, ease emotions and be a problem solver to resolve the claim.

## Getting Noticed

An individual doesn't need to be in a formal leadership role to display the skills of an effective leader. If one takes a close look, almost every team in an operation has at least one informal leader in the group. Further, the informal leader isn't always the most senior member on the team. Individuals who champion change and help team members navigate through change are important to the success of any operation. As we have all heard, change is inevitable in today's environment. It's not a matter of will change occur, it's when will the next change take place. In the claims environment, there are a number of enhancements being driven by technology developments and process oriented modifications. Insurance professionals who can quickly adapt to these changes should consider assisting others and seek opportunities to be a spokesperson for the endeavor.

Communication is key when having one on one discussions with a direct manager. Take the initiative to actively prepare a meaningful development plan to include early leadership training, assisting as a team member on special projects and helping onboard new hires. Attempt to find opportunities to job shadow or participate in enterprise level endeavors across departments.

At Germania Insurance, the leadership team has been working hard for multiple years to engrain these thoughts and philosophies into the culture, recruiting efforts, training and execution of its staff. A robust succession planning process has been adopted to help Germania remain relevant for another 120 years.

# PAYAL PATEL

2019 RISE AWARD RECIPIENT



**PAYAL PATEL**  
SENIOR VICE PRESIDENT,  
E&O AND CYBER CENTER OF  
EXCELLENCE  
  
MARSH JLT SPECIALTY  
  
NEW YORK

Payal is an ambassador for her company, for women of color in the industry and for millennials (she breaks the stereotype!). She has won the admiration of clients, colleagues and underwriters alike with her strong work ethic. Payal has demonstrated fantastic ability as a broker.

*“It’s amazing how confident she is both internally when working with her team and colleagues and externally with her clients. She is extremely technical in her vertical, cyber insurance, and strives to be best in class. One additional differentiator is her ability to secure competitive, comprehensive cyber insurance coverage for large sophisticated clients. She has mastered the ability to build large cyber insurance layered programs which is no easy task!”*

– Meredith Schnur, US Cyber Brokerage Leader,  
Marsh USA, Inc.



The placement identified above involved balancing the interests of risk managers and several dozen markets on three continents. It also included reinsurance and fronting components. Payal led numerous meetings and calls at all hours to enlist the support of Marsh colleague resources and underwriting talent around the globe. During this period she quietly earned a promotion and didn't even tell anyone. Payal is a team player and a rising star in her firm but very humble about her capabilities. She has spearheaded several complex Cyber placements, the most recent of which was a \$460M global program for a multinational entertainment and technology company.



“United Automobile Insurance Company has been providing a high quality and low cost insurance product to the automobile insurance market since 1989”

**We want to Congratulate**

*Sherria Williams*

**on being named:**

**RISE PROFESSIONAL  
Class of 2019**

States : Florida | Texas | Georgia

www.uaic.com



# SHERRIA WILLIAMS

2019 RISE AWARD RECIPIENT



SHERRIA WILLIAMS  
INSURANCE DEFENSE  
ATTORNEY

UNITED AUTOMOBILE  
INSURANCE COMPANY

FLORIDA



Sherria is a rising star and deserves recognition for her legal skills as well as the programs she has developed for the youth in her community. Sherria has worked on countless projects which would lead to the dismissal of several cases based on fraud. Additionally, Sherria is the enrichment programming chair for local nonprofit, Big Dreams For Kids, Inc. where she coordinates and implements activities promoting academic excellence, mental health awareness and antibullying and anti-violence programs and initiatives for over 10,000 youth. She quotes, “Service is the rent we pay for being. It is the very purpose of life,” by Marian Edelman. As Board Member of the Gwen S. Cherry Black Women Lawyers Association, Sherria created “The Rainmakers Academy” a multisession program which focuses on teaching its participants how to bring in new business/ accounts in the legal arena. This program has been recognized and provided grant funding by The Young Lawyers Division of The Florida Bar since its inception.

*“Sherria is a force to be reckoned with. The sky is the limit for her. I can’t wait to see what’s next.”*

– Daniel Colon, Vice President of Oversight,  
United Automobile Insurance Company

She’s a “fraud buster.” Her litigation tactics has led to deter medical providers, doctors, chiropractors from filing fraudulent claims and providing false services. This has made the insurance industry better due to the increased fraud that has been rampant in the South Florida community. Sherria always rises above the call of duty for any assignment given to her.



## The Path Well Chosen - Insurance

By: Catherine Reese, Chief Claims Officer at Tower Hill Insurance Group



No matter what path you choose in insurance, you're helping people. From Underwriting to Claims, our industry is focused on reducing risk, protecting people from economic devastation, and making them whole when a loss occurs. As we move through 2019, we're doing that in a world that's rapidly evolving with new risks, changing expectations, and a shifting talent framework.

A quickly changing world means that new risks are surfacing faster than ever. ADAS systems reduce the risk of crashes, but can increase severity and lull drivers into false complacency. The gig economy brings in income, but many participating don't understand the coverage gaps renting a room, delivering food, or driving people to the airport in assets that were previously 100% personal can create. We carry devices in our pockets that send data on where we are and what we're doing to a dozen companies, but rarely know the end use of that data. Pictures of our children feed into facial recognition on social media, and even DNA goes online. New products and endorsements continue to evolve as these challenges arise, and it's also our goal to educate our customers as their lifestyles evolve.

As our customers interact with more Amazon and Uber-like platforms, their expectations continue to shift. Poli-

cyholders want to be able to get information on demand and follow policy acquisition and claims as closely as they do an online order. IOT-driven usage and behavior-based products have customers taking a more active role in their products and pricing, however each customer will have unique comfort levels. Early adopters and innovators may be comfortable buying a policy online, letting their connected home monitor their water use, tasking Alexa to report a claim for them, watching a YouTube video about the Claims process, integrating their Google calendar for an inspection appointment, and seeing updates through push notifications. But others may not be comfortable enough with either technology or insurance to take that approach, and will need a hybrid of personal, device-supported, and automated touches.

To personalize the digital and personal experience for each customer, our industry has to keep evolving our approach to talent. Automation is a fantastic tool to support this evolution, as it speeds up or eliminates "if-then" and widget moving processes, giving insurance professionals the ability to focus on decision making, emotional intelligence, and simplifying processes for our customers. This shift from more tactical duties to higher-level tasks and strategic thinking is positive, but it requires adaptation from our professionals as they distill information from more sources than ever before, then determine the best way to personalize that information for the customer through dozens of potential channels.

Talent strategies will have to recruit, train, and retain skillsets that may not exist yet, all while distilling the invaluable institutional knowledge of our long-time professionals. Customers and employees expect flexibility, and that flexibility has to be enabled by the right systems and communication strategies. It's an exciting time to be in insurance, because with new risk comes more opportunities than ever before to fulfill insurance's foundation of protecting others.



**CONGRATULATIONS  
TO RISE'S 2019  
AWARD WINNERS!**

A deposition should be smooth – no matter how many bumps arise. So we micromanage the process, from the right location to the right reporter to accessing the right technology.

With 40+ locations across the country and support in 25 countries, we'll get your deposition right anywhere from Cairo, Egypt, to Cairo, Georgia.

For you, it's less stress. For your case, odds of a better outcome. Come see how we do depositions differently.

# Personal Sustainability for Today's Insurance Professional

By: Bernie G. Heinze, Esq. President of Heinze Group, LLC



Over the past 36 years, it has been a privilege to continue working in the insurance marketplace: first as an insurance defense and coverage trial attorney, vice-president and national chief litigation counsel for a property and casualty insurance company, executive director of a professional insurance trade association, and now as a legal and insurance executive today. During these years, I have been able to observe what makes a leading professional and the values that will sustain them as they ascend through their career. Here are five thoughts to consider:

**1. Differentiate Yourself.** There are thousands of insurance professionals in the industry. What makes you stand out from the rest? Be a sponge and absorb everything you can read, observe, hear and see. Then, find one thing, just one thing, and become an expert in it. Be the “go-to” person on that topic in your organization and to its customers. You can start a podcast, blog, or offer to speak at functions.

**2. Stay humble, loyal and caring.** No matter what your role is throughout your career, consider the organizational chart as horizontal versus vertical. Take an interest in and treat everyone respectfully and on the same level as you. It is an uncommon trait these days. Remember, what's more important...a professional title on your business card or the testimony of how you will be remembered? When you've made it

into a management or leadership role, forget about “empowering” your team. Inspire them! Don't just give them tools and resources, give them your heartfelt interest, encouragement, and inspiration of goals they can achieve by exemplifying your personal brand of leadership. Share the credit. No one gets where they want to go alone.

**3. Never eat lunch alone.** Everyone has a story to tell. The insurance business is still built on trusted relationships. The more we share that golden hour with others, the more we can learn, expand, and foster our professional network. Watch those new ideas and opportunities harvested from a conversation over a salad, soup or sandwich and a Diet Pepsi.

**4. Burn the Boxes.** Remember the phrase “think outside the box”? Forget about it. The boxes and those who think outside of them are history. Don't look back for inspiration from them: you're not going that way. Think ahead and of writing on a blank canvass or iPad screen and ask the question: “What if?” It's more important to ask the best questions than having all the answers. In today's marketplace, we're all looking for the next big idea or how to change the paradigm. Constantly challenge the status quo and use your own personal skills to creatively develop that new portrait and landscape.

**5. Serve your community.** Get involved in a non-profit, your church, temple or synagogue, little league, 4-H, or senior center. Rather than asking “what's in it for me?” ask “How can I serve?” You will exponentially lift up the lives of others and yours in the process. Life is balancing yourself, family, profession, and spending yourself in a worthy cause.

These are just starting blocks to help sustain a professional on the rise. Today is best time to be in the insurance marketplace. Thanks for what you've done and all you're going to do. You got this. Make a difference. Leave a mark. Be sustainable.

# As They RISE... They Elevate Our Industry.



Wilson Elser salutes this year's deserving  
**RISE Award winners.**

We look forward to their continued contributions to their respective organizations and to the broader insurance industry.

[wilsonelser.com](http://wilsonelser.com)

150 East 42nd Street  
New York, NY 10017  
212.490.3000

38 Offices Nationwide



© 2019 Wilson Elser. All rights reserved. 372-19

# Lessons on Serving as a Great Mentor

By: David T. Vanalek, Esq. Claims Chief Operating Officer Markel®



Early on in my professional career, I was very fortunate to be surrounded by those who took an avid interest in my development - a high school speech and debate coach, a sitting jurist, and an elected official. It wasn't clear to me at the time why I may have peaked their interest, as I certainly did not feel that I warranted their limited time or undivided attention. However, after these many years, things are more lucid: we in our respective professions have a moral duty to mentor the next generation of leaders in our industry, and we should do everything we can to support the growth and development of those who have the desire and passion to take all of us to new heights and uncharted waters.

As such, over time, I've been fortunate to serve as a mentor for many in our profession - sharing those lessons I learned at an early age. I offer the following lessons to you, so that you may profoundly and positively impact those around you:

**Actively Listen:** I first joined the speech and debate team in high school to overcome my fear of public speaking. I hated awkward silences, and was under the false impression that talking more helped the situation. My first mentor- a speech and debate coach- taught me this was not the case. She told me that active listening, and not just hearing others, was a predicate to true understanding and formulating a cogent response. The lesson carries over to the mentor relationship. As Coach John Wooden once noted, "[w]e'd all be a lot wiser if we listened more ... not just hearing the words, but listening and not thinking about what we're going to say."

A great mentor is not one who pontificates ad nauseum about

a particular topic that suits his fancy. Rather, a truly profound mentor spends most of her time listening to her mentee, and deeply understanding those areas where she can provide guidance and support.

**Ask Questions:** I had a wonderful opportunity in law school to serve as a judicial extern for an associate justice of our highest state court. On my very first day on the job - eager and curious just like any of us would be - I asked the justice, "So, what can I do?" She kindly smiled at me and sagely advised "wrong question- what do you want to do?" As I sat there and pondered, I knew I wanted to do more than draft legal memos - I wanted to make recommendations to her on important matters coming up before the highest court. Incredibly, she made it happen.

A truly great mentor recognizes that for one to grow professionally or personally, one cannot direct or explicitly instruct others. Rather, he is infinitely curious, and asks multiple questions to guide the mentee - allowing them the opportunity to discover their true desires.

**Identify Opportunities:** Right after college, I had the pleasure of learning from the head of a state organization responsible for, among other things, making clemency recommendations to the governor's office for inmates. While this was an entirely new area for me and I was outside my comfort zone, he wanted my opinion and recommendations, along with those of his staff, to arrive at the best decisions. He shared with me that he wanted my untarnished views, because ultimately, it was the public who he served. Since then, I've identified and afforded opportunities to others to serve in similar, objective roles.

A terrific mentor recognizes opportunities to expose her mentee to new ideas and ways of thinking to not only avoid blind spots and groupthink, but to arrive at better decisions and courses of action for the broader organization. In the process, the mentee develops new skillsets and experiences that will transcend into other areas during the course of his career.

While there are many other key lessons to being a great mentor, the three above - actively listen, ask questions, and identify opportunities - are the cornerstones to starting a great mentoring relationship with our next generation of leaders. Try it out - you'll be glad you did.

# JOIN THE RISE NETWORK



# Join RISE

GROWING, RECOGNIZING, AND ADVANCING THE BEST NEW AND YOUNG PROFESSIONAL TALENT IN THE INSURANCE INDUSTRY

MONTHLY WEBINARS

SCHOLARSHIPS

AWARDS

DISCOUNTS TO  
INDUSTRY CONFERENCES

NETWORKING OPPORTUNITIES

CAREER ADVANCEMENT

CE/CLE CREDITS

NEWSLETTER

BLOGS

VIDEOS

AND MUCH MORE

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

## THANK YOU TO OUR PARTNERS

ACE america's  
claims  
executive  
Leadership Forum & Expo



INSURANCENEXUS



PLRB

Property & Liability Resource Bureau

## FOLLOW US ON SOCIAL MEDIA



Check out videos from past conferences with interviews of executives