ABOUT THE PROGRAM

WSIA and Emory University’s Goizueta Business School partner to deliver a collaborative three-day program for managers in the wholesale and specialty insurance industry. Combining industry knowledge and world-class management training, this program prepares participants for their current and future leadership positions by examining the foundation of good management.

Surplus Lines Management

WSIA and Emory University’s Goizueta Business School partner to deliver a collaborative three-day program for managers in the wholesale and specialty insurance industry. Combining industry knowledge and world-class management training, this program prepares participants for their current and future leadership positions by examining the foundation of good management.

WHO should attend
Any broker, managing general agent or underwriter who manages a team and a book of business. The program is particularly applicable for those transitioning into leadership roles while maintaining responsibility for their own book of business.

WHAT to expect
- In addition to some traditional classroom settings, participants work extensively in small groups and study group breakouts.
- Various industry leaders and Emory University’s own leadership expert teach in the context of real-life settings and situations managers face.

"The investment and time - well worth it. After about four hours of the first day, I could tell this would benefit me for years to come.”
- JEFF FIELDS, MARKEL

SELF-ASSESSMENT
Emory University Associate Professor Dr. Peter Topping, known for his expertise in leadership and organizational behavior, covers various leadership topics including managerial leadership, the Birkman Assessment, and building an effective team.

Discover yourself, understand others
Your motivations and behaviors in a workplace differ from others’. During the program, you will:
- Take the Birkman Assessment provided by Emory University
- Develop a higher level of self-awareness and emotional intelligence and learn how to apply that to team leadership

Build a strong, cohesive team
Dr. Topping leads participants through the best practices of building a high-performance team.
- Keys to building a team from the ground up
- How to incorporate emotional intelligence
- Effective ways to measure team performance

MANAGEMENT
Industry leaders also serve as faculty and offer a multi-faceted experience that has immediate value and application to your career and organization.

Learn from industry executives
The WSIA Executive Panel offers time for Q&A as industry veterans impart their best practices and knowledge.

Manage a larger book of business
There are different types of books of business; you will learn the fundamentals are the same.
- Improve your ability to balance your book of business and your team simultaneously
- Learn how to handle accounts while seeking new opportunity

Manage the wholesale relationship
Knowing what you need and what your partners need is essential in all relationships.
- Learn from industry leaders with years of management experience
- Walk through realistic scenarios that impact relationships within the surplus lines industry
- Apply your self-assessment results for each case study to develop problem-solving strategies

Analyze surplus lines trends and understand regulations
- Recognize common mistakes in surplus lines regulations
- Learn how trends and pitfalls affect you and everyone in the industry
“It really gave an opportunity to **reflect and become more self-aware** of the things that work well for me in my behavioral style and the things I need to work on to become a more effective leader”

— AL GERACI, RPS

“The Surplus Lines Management Program has brought an amazing wealth. It’s been difficult to get away from the office for a week, but I definitely feel that getting away for this week was **one of the most productive weeks** I’ve spent out of the office.”

— ASHLEY GANNE, BURNS & WILCOX

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**WSIA TECHNICAL & CAREER DEVELOPMENT**

**Surplus Lines Regulatory Compliance**
- For insurance professionals seeking an introduction to regulatory compliance

**Underwriting Boot Camp**
- For underwriters with single-line experience or employees in a technical role seeking to move into an underwriting role in the future

**Marcus Payne Advanced E&S**
- For E&S professionals with 5-15 years of insurance experience to strengthen their surplus lines knowledge

**Surplus Lines Management**
- For professionals transitioning into leading teams while still responsible for their own book of business
  - Offered at Emory University’s Goizueta School of Business in Atlanta, GA

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**INTRODUCTORY**

**Excess & Surplus Lines**
- For professionals early in their careers to gain understanding of broker/carrier relationships and how surplus lines works in the marketplace

**Consultative Selling and Negotiations**
- For any surplus lines professional who transacts business and has relationships with clients

**Effective Coaching**
- For surplus lines professionals responsible for a team to receive customized coaching training

**EXECUTIVE LEADERSHIP SUMMIT**
- For E&S senior-level professionals developing and implementing strategic planning, leadership and management change
  - Offered at University of Virginia’s Darden School of Business in Washington, D.C. area

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**INTERMEDIATE**

**Surplus Lines Fundamentals**
- For insurance professionals seeking an introduction to E&S

**Effective Coaching**
- For surplus lines professionals responsible for a team to receive customized coaching training

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**EXPERIENCED**

**Advanced E&S**
- For E&S professionals with 5-15 years of insurance experience to strengthen their surplus lines knowledge

**Surplus Lines Fundamentals**
- For insurance professionals seeking an introduction to E&S

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**ALL LEVELS**

**WSIA University**
- Designed to improve technical underwriting competency and develop networking relationships with peers

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**REGISTRATION AND ACCOMMODATIONS**

**WHEN**
- February 1-4, 2021

**REGISTRATION & COST**
- Registration closes January 4, 2021.
- Tuition is $2,200 per participant.
- This fee includes all course topics, hotel accommodations and meals on-site at Emory University.

4131 N. Mulberry Dr., Suite 200
Kansas City, MO 64116
816.741.3910

wsia.org