



February 6 - 7 | Washington, DC

SUMMARY

The Council's Human Resources Leadership Working Group met during the Legislative & Working Groups Summit, February 6-7, 2017, at The Mandarin Oriental Hotel in Washington, DC. The meeting was staffed by The Council's Elizabeth McDaid, Julia Ruiz and Tish Carden. The agenda focused on building HR as a strategic partner and introduced The Leadership Challenge's first practice of exemplary leadership – Model the Way.

PARTICIPATING FIRMS

In attendance were 26 participants from the following Council member firms:

Assurance Agency	EHD	Keenan
BancorpSouth Insurance	Gehring Group	Kelly & Associates Insurance
BMS Intermediaries	Haas & Wilkerson Insurance	Murray Securus
Brown & Brown	Heffernan Group	NFP
Consolidated Insurance Center	Hub International	Oswald Companies
Cottingham & Butler	Hylant	Starkweather & Shipley Insurance
DiBudo & DeFendis Insurance	Johnson Kendall & Johnson	The Crichton Group

MONDAY, FEB. 6

Introductions

The meeting began with an icebreaker exercise which allowed the group to become acquainted with each other.

The Leadership Challenge

Presented by Roxanne Kaufman Elliott, CEO & President of ProLaureate

What is leadership?

- Leadership is...
 - A deliberate practice
 - An aspiration and a choice
- Leaders...
 - Make a difference
- Are leaders born or made?
 - With deliberate practice, focus and attention, leadership can be learned
 - Courage is like leadership—it can be learned
- Myths of Leadership:
 - **Talent:** Leaders require no training. The necessary skillsets are built in.
 - **Position:** When you have a position at the top, you're already a leader.
 - **Strength:** You should only take the tasks you're strong in.
 - **Self Reliance:** Leaders have to be independent and autonomous.

Leadership and cultures of leadership are built in moments...Not in business plans.

Personal Best & Vision

Participants spent time reflecting and discussing a time in their life when they were at their personal best and what characteristics and behaviors they displayed at that time. Participants were encouraged to set a vision for the future based on their personal best moments.

The LPI 360:

Prior to the meeting each participant took the LPI 360 assessment and received anonymous feedback from the people who work with them. This typically includes the employee's manager, peers and direct reports.

- The LPI 360 measures frequency of behaviors found in The Leadership Challenge Five Practices of Exemplary Leadership: *Model the Way, Inspire a Shared Vision, Challenge the Process, Enable Others to Act, and Encourage the Heart*

Kaufman Elliott reviewed the components of the LPI 360 and explained how participants should read the results and what to do with the information.

Model the Way

Kaufman Elliott facilitated a deep dive into the first practice of exemplary leadership – Model the Way.

- Find your voice by clarifying your personal values. Find examples of how you can align these values with every day actions.
- Set the example by aligning actions with shared values
- Source of Credibility
- Characteristics of admired leaders
 - Trustworthiness = Honesty
 - Visionary = Forward Looking
 - Dynamism = Inspiring
 - Expertise = Competence
- Clarify and articulate the values that will guide your decisions and actions as a leader
- Do what you say you will do

Participants set personal goals to practice Modeling the Way over the next few months.

The HR Working Group will continue its work with The Leadership Challenge over the next two years by dedicating a ½ day of each meeting to the program. The focus of the upcoming September meeting will be *Inspire a Shared Vision*.

TUESDAY, FEBRUARY 7

The Council Foundation

Presented by Cheryl Matochik, SVP Strategic Resources & Initiatives

Studies show that internships are the insurance brokerage industry's most successful tool in the recruitment of college students. In light of that, The Council's 501(c)(3) educational foundation is partnering with its member firms with the goal of bringing fresh, diverse talent into the brokerage sector. This summer, participating firms can nominate their best interns to receive \$5,000 scholarships.

Matochik informed the group that more detailed information on how to participate and/or support this initiative will be sent out before the end of February.

Producer Hiring Tool

Presented by Pamela Walters, EVP The Devine Group

Walters presented The Devine Group's hiring assessment that can be used to help employers hire smarter, develop their talent and drive results.

Roundtable Discussion- Struggles And Successes

The group identified the following struggles:

- Transitioning books of business for retiring producers
- Transitioning Producers to Account Executives if they are not producing new business
- Managing compensation and benefits of acquired firms
- Managing culture for work from home policies
- Parents being involved in hiring process of millennials

NEXT MEETING

The next Human Resources in Insurance Working Group is set to take place **September 18-19** at The Council's headquarters, in Washington D.C.

Council staff will be reaching out via email to gauge interest on topics for the next meeting.