

# JOIN US IN 2018

## LEADERSHIP FORUMS

February 5 – 8	Legislative & Working Groups Summit	Washington, D.C.
May 29 – June 1	Employee Benefits Leadership Forum (EBLF)	Colorado Springs, Colo.
September 29 – October 2	Insurance Leadership Forum (ILF)	Colorado Springs, Colo.

## WORKING GROUPS

February 5 – 8	Legislative & Working Groups Summit	Washington, D.C.
June 5 – 7	CFO & Finance Managers Conference	Charleston, S.C.
June 11 – 12	Legal Counsel Working Group	Washington, D.C.
September 12 – 13	HR Working Group	Washington, D.C.
September 20	CFO Working Group	Conference Call
September 28 – 29	International Working Group	Colorado Springs, Colo.
October 22 – 23	Claims and Risk Management Working Group	Washington, D.C.
October 24 – 25	CIO Working Group	Washington, D.C.
November 7 – 8	Marketing & Communications Working Group	Washington, D.C.
November 12 – 13	Legal Counsel Working Group	Washington, D.C.

## LEADERSHIP ACADEMY

### EXPERIENTIAL WORKSHOPS

February 20 – 22	Broker Smackdown – International	Prague, Czech Republic
March 7 – 8	Leadership Lessons from World War II	New Orleans, La.
March 13 – 15	Broker Smackdown – South	Atlanta, Ga.
April 10 – 12	Benefits Broker Smackdown	Scottsdale, Ariz.
April 24 – 26	Targeting Team Leadership	Adairsville, Ga.
May 8 – 10	Broker Smackdown – West	Napa Valley, Calif.
May 15 – 17	Commanding the C-Suite	Gettysburg, Pa.
July 10 – 12	Broker Smackdown – Midwest	Chicago, Ill.
October	Grow Your Book of Business	Location TBA

### VIRTUAL WORKSHOPS

January	Creating Positive Outcomes from Difficult Conversations	Online
February	Sales Management Fundamentals	Online
March	Company Culture for Today's New World	Online
April	Building Your Mentoring Network	Online
May	The Leader Coach	Online
May	Finance is Fun	Online
June	Customer Experience	Online
July	Time Management Essentials	Online
August	Problem Solving & Decision Making	Online
September	Change Management	Online
October	Building Long-Term Business Relationships	Online
November	Flexible Leadership	Online
December	Recruiting & Hiring	Online

# 2018 WORKING GROUPS

The Council's Working Groups provide an opportunity for executives and professional staff of member firms to connect with others who face similar issues and challenges in their respective areas of work. Participants engage in open dialogue in non-competitive settings, gain insights and market intelligence, hear from industry thought leaders, and walk away with a solid network of professionals. Each group stays in touch throughout the year on various platforms to keep the conversations fresh.

## CFO

### Working Group

Designed exclusively for CFOs and financial managers with a focus on growth strategies, regulatory compliance, mergers and acquisitions, financial reporting, and other issues challenging today's financial executives.

#### TOPICS INCLUDE:

- Organizational structure and staffing strategies within finance
- Expense control mechanisms
- Integrating systems to maximize reporting and controls
- Driving growth and probability through internal customized dash boarding

## CIO

### Working Group

Designed for CIOs, CFOs, COOs and other agency technology leaders to talk through strategic and operational aspects of agency operations from a tech perspective.

#### TOPICS INCLUDE:

- Data analytics
- Customer-focused technology
- Emerging insurance technology trends
- Project prioritization

## CLAIMS & RISK MANAGEMENT

### Working Group

Brings together claims management, risk control and liability professionals to discuss loss prevention perspectives and experiences, and explore proven strategies from today's market leaders.

#### TOPICS INCLUDE:

- Intersection of claims and loss prevention functions
- Government regulations (State, DOT, OSHA, CMS)
- Litigation issues, tort reform and challenges posed
- Changing claims management view of risk due to data and technology
- Cybersecurity and data breach coverage

## HUMAN RESOURCES

### Working Group

Gives HR professionals and those with HR responsibilities a venue to network, exchange ideas, learn from and connect with other member firm HR practitioners. Discussion, education, training and presentations by thought leaders support the identified goals of the group.

#### TOPICS INCLUDE:

- Recruitment, training, retention and rewards
- Leadership development and succession planning
- Performance management and employee relations
- M&A
- Communications and compliance

## INTERNATIONAL

### Working Group

Offers an open forum for business development executives, brokers and agents with cross-border risk placements, and firms with an interest in growing their international practice to exchange views with peers, strengthen global ties and launch new partnerships with sectorial leaders from major global markets.

#### TOPICS INCLUDE:

- Applied issues of placing international coverage and benefits
- International regulatory developments and advocacy
- Global recruitment, talent and leadership development
- International benchmarking and market intelligence
- Data analytics and IT application for international business
- Cybersecurity and privacy concerns

## LEGAL COUNSEL

### Working Group

A forum for legal counsels to discuss issues impacting brokers in the judicial, legislative and political arenas. Discussions are led by The Council's government affairs staff and outside counsel at Steptoe & Johnson.

#### TOPICS INCLUDE:

- TRIA, NARAB, ACA, FATCA
- Rebating
- Surplus lines
- Broker duty of care
- Marketing conduct examinations
- NAIC

## MARKETING & COMMUNICATIONS

### Working Group

Designed for CMOs and marketing and communications professionals, discussions focus on marketing's role in evolving the firm's brand and maintaining brand integrity as the firm's market share expands.

#### TOPICS INCLUDE:

- Marketing's role in acquiring talent and growing the firm's business
- Branding for M&A and perpetuation in best practices
- Corporate governance
- Digital and social media
- Content strategies
- Data's role in marketing strategy to enhance revenue