

# 44 Proven Strategies



## Promoting Professional Development with The Institutes

Successful insurance organizations know that a knowledgeable workforce is a competitive advantage. Here are 44 specific techniques you can use to be successful, too.

# Choose the ones that will work best for you!



## Promoting Professional Development

- Publicize the support of top executives.
- Develop the support of managers throughout the organization.
- Publicize courses and programs throughout the organization.
- Reward educational efforts and achievements.
- Provide support for active candidates.
- Send educational bonus awards through line managers.
- Schedule company-wide education days.
- Use photos and quotes that demonstrate top management support.
- Recognize CPCUs as a talent pool.
- Hold an annual achievement event.

## Publicize the Support of Top Executives

- Develop a strategic goal to promote insurance education throughout the organization and to increase CPCU enrollments.
- Honor new CPCU designees by holding a reception or dinner in connection with the national conferment ceremony.
  - Involve the CEO or another top executive as host or speaker.
  - Include a photo in the company newsletter.
- Distribute annual information from the CEO to senior executives regarding the organization's "participation rate" in educational programs, demonstrating the CEO's personal interest.
- Publish in the employee publication a series of profiles of senior executives emphasizing the role of insurance education in their careers.
- Feature The Institutes in the company's annual report, with pictures and profiles of completers, testimonials from executives, and a summary of financial support as an investment in the future.
- Furnish key executives with the names of course and program completers, and encourage them to send a congratulatory message to each individual.

## Develop the Support of Managers Throughout the Organization

- Require that managers include a professional development goal in annual performance objectives.
- Ask home office executives to stress education with both managers and employees when visiting field offices.
- Send educational bonus awards, achievement certificates, congratulatory letters, expense reimbursement, and symbolic awards (such as flowers) through line managers.
- Ask managers to serve as educational mentors or personal sponsors of employees who take Institutes' courses.
- Invite line managers to help in planning education days, career days, and other promotional campaigns.
- Actively promote educational opportunities available to middle managers and line managers. They should show educational leadership examples.

## Publicize Courses and Programs Throughout the Organization

- Encourage each employee to take individual responsibility for maximizing his or her career potential by emphasizing the long-range benefits of professional development.
- Appoint an education coordinator in each major department or office.
- Schedule annual or semiannual company-wide education days, and encourage local offices to schedule their own e-days.
  - Invite the local CPCU chapter and organizations that sponsor The Institutes' courses to participate.

- Invite local colleges that sponsor The Institutes' courses and those that offer college credit for passing those courses.
- Invite an Institutes' representative to participate.
- Publish an annual education issue of the company newsletter, preferably timed to coincide with the education day event.
- Provide counseling or use The Institutes' free course-selection counseling service.
- Include desired and required insurance education in position descriptions and in job postings.

### **Reward Educational Efforts and Achievement**

- Pay all expenses for new designees and their spouses (or companions) to attend the national conferment ceremony and the CPCU Society Annual Meeting and Seminars.
- Publicize the company reception or dinner held in connection with the CPCU national conferment ceremony. Use photos and quotes that demonstrate top management support.
- Have top executives present a CPCU key to each new designee. (Jewelry items are also available for other Institutes program completers).
- Give cash awards for course and program completion.
- Provide continuing recognition to CPCUs who requalify (at two-year intervals) under the CPCU Continuing Professional Development (CPD) program.
- Give “downstream” recognition after program completion to help retain educated employees and to remind them that their past educational accomplishments continue to benefit the organization.
- Mention educational accomplishments and designations when announcing promotions.
- Arrange for or pay for the framing of diplomas and certificates, and encourage their display in the office.
- Include designations on letterheads, business cards, memo pads, name plates, and distribution lists, and in office directories.
- Recognize CPCUs as a talent pool, drawing on them as educational and idea resources for the company.
- Pay CPCU and other professional society dues.
- Give special recognition to employees who serve as Institutes course leaders and as personal sponsors.
- Make sure exam passers and program completers receive at least one congratulatory letter from a superior, with copies to the employee's personnel file as appropriate.

- Hold an annual achievement recognition event in all offices, inviting all course and program completers and their immediate supervisors.
- Recognize educational efforts during each employee's performance appraisal.
- Remember to recognize the support provided by spouses, mentors, supervisors, and significant others.
- Recognize Institutes' program completers as soon as possible after they receive their final report cards.

### **Provide Support for Active Candidates**

- Stress the career-enhancing potential of earning the most highly respected professional credential in property-casualty insurance—the CPCU designation.
  - Pursuing the CPCU designation increases professional knowledge to enhance job performance.
  - Earning the CPCU designation is an achievement that demonstrates commitment and self-discipline.
- Encourage each employee to take individual responsibility for maximizing his or her career potential.
- Provide some on-the-job time for educational activities such as classes, final review, and taking the exam.
- Monitor in-house class attendance, and contact apparent dropouts.
- Monitor and support the activities of independent learners and study groups.
- Provide counseling for those who have second thoughts about education or who suspect they may have selected the wrong course.
- Provide support for conscientious dropouts. Keep the door open for the future.
- Provide support for nonpassers. Recognize the risks they took and the benefits they gained, and encourage trying again.
- Don't expect immediate results from a change in educational policy. It takes time to complete educational programs and to change a culture.
- Encourage employees to sign up for the CPCU Candidate Mentoring Program, which will connect them with a mentor in the local CPCU Society chapter, or develop your own in-house personal sponsorship program.

To discuss these ideas or others, please contact:

**Dave Thomas, CPCU, Director of Sales**

Phone: (610) 644-2100 x 7698 | E-mail: [thomas@TheInstitutes.org](mailto:thomas@TheInstitutes.org)



720 Providence Road, Suite 100 | Malvern, PA 19355  
(800) 644-2101 | [customerservice@TheInstitutes.org](mailto:customerservice@TheInstitutes.org)  
[www.TheInstitutes.org](http://www.TheInstitutes.org)