

# Here For You 2024: PIA of Florida's Annual Meeting and Trade Show – Session descriptions

## CPIA 1 – Position for Success

Instructor: Becky Lathrop

During this workshop, participants focus on internal and external factors affecting the creation of effective business development goals. Factors discussed include:

- current state of the insurance marketplace.
- competitive pressures.
- insurance carrier underwriting criteria, and
- consumer expectations.

The **Certified Professional Insurance Agent (CPIA) Designation** is the first-of-its kind, hands-on, how-to training on sales and marketing topics and techniques. It is nationally recognized as the mark of professionalism, commitment to professional training and results, and exceptional technical knowledge.

To earn the CPIA designation, candidates are required to participate in a series of 3, one-day *Seminars*. Seminars are designed to enhance the ability of producers, sales support staff, and company personnel to efficiently create and distribute effective insurance programs. Participants leave with actionable ideas that can produce results immediately.

## **2024 Commercial Lines & Personal Lines Agent Roadshow**

Presented by: Carl Rockman & Team,  
Citizens Insurance

### **2024 Commercial Lines Agent Roadshow:**

This course will teach you how to create error-free commercial line submissions by:

- Identifying when a risk is eligible for Citizens' Commercial Residential or Nonresidential.
- Discussing property condition requirements and inspections.
- Navigating the submission process, including timelines for approval and binding coverage.
- Citizens Update
- Engaging in Q&A with Citizens' underwriting and agency experts.

By the end of this course, you will be able to confidently create commercial line submissions that meet Citizens' eligibility criteria and requirements.

### **2024 Personal Lines Agent Roadshow:**

The role of a Citizens-appointed agent can be complex. This course will provide new and veteran agents with the tools and resources needed to keep pace with Citizens in 2024. We will:

- Review new business processing and underwriting tips.
- Identify and correct common errors and provide best practices to service your policies.
- Demystify the accounting process.
- Citizens Update
- Explore the benefits of myAgency
- Offer the opportunity for live Q&A with Citizens' experts.

This course aims to enhance your proficiency and confidence in managing your role as a Citizens-appointed agent. We look forward to your participation.

## **Secret Shopper: 10 Ways We Hurt Our Sales Process**

Presented By: Kelly Donahue-Piro  
Agency Performance Partners  
Founder, Agency Appeal

44% of salespeople give up after 1 follow up and 80% of sales require 5 follow ups. Knowing this statistic, what do we need to do to overcome it? The answer is spend time sharpening your sales prowess through training and execution. We will explore the best strategies for prospecting, vetting a deal, account rounding at the point of sale and asking for the business. In addition, we will work through how to combine marketing, referrals and a personal brand into your very own ridiculously amazing sales process. Everyone has to buy insurance and this process will show you how to get them to buy it from you!

## **AI: Your Secret Weapon for Winning Back Time and Money**

Presented By: Jason Cass  
CEO & Podcast Host  
Insurance Agency Intelligence

AI is here to enhance agents, not replace them. AI is what we all have been waiting for! There is so much more to do while being paid less every year; AI is the tool that is going to help us win back our time and money!

Jason will summarize what he has spoken about for the last ten years and how he predicted it to be exactly where we are now. To help you understand where we are now, Jason will show you how to use AI to win going forward using two real-life examples and case studies.

If you are in the insurance industry, this presentation is for you. From 30k feet to ground level, Jason explains, shows, and proves that it has never been a better time to be an agent—and we are just getting started!

## **Advocacy Update**

Presented by: Lisa Miller  
CEO & Former Deputy Insurance Commissioner of Florida  
Lisa Miller and Associates

Join Lisa Miller, former Deputy Insurance Commissioner of Florida and a fierce advocate for the state's insurance industry, for an essential update on current legislation and industry news. Lisa will provide insights into recent legislative developments and their impact on the insurance sector, ensuring you're informed and prepared for the changes ahead. Don't miss this opportunity to stay ahead of the curve with expert analysis from one of the industry's most influential voices.

## **Staffing & Recruiting in Today's Insurance Market: Key Strategies for Success**

Presented By: Nolan Duda  
Client Experience Manager  
IdealTraits

In today's insurance realm, finding and retaining top talent is crucial for sustained success. "Staffing & Recruiting in Today's Insurance Market: Key Strategies for Success" is a guide tailored for insurance industry professionals navigating the challenges of hiring in the current landscape. This presentation dives into essential strategies for sourcing, attracting, and keeping top-tier talent in a fiercely competitive market. From innovative recruitment techniques to fostering an enticing company culture, this session offers practical insights that redefine recruitment success. Join us as we explore the pivotal strategies reshaping the way insurance agencies approach staffing, propelling them forward in an ever-evolving industry.

## **The Future is Now! How the Use of AI is Changing Insurance**

Presented By: Chad Guyer  
Sr Business Development Manager  
ABA Insurance Services Inc.

With each passing day the use of AI continues to grow within the insurance Industry. It's use in areas like customer service, claims, and data analysis are already in use and helping carriers and agencies provide a better customer experience. In this session we will discuss the benefits and potential issues with AI from both the Carrier and Agency perspective.