

2018 **LEADERSHIP**
C  **NFERENCE**
JULY 18-20 WILDERNESS RESORT WISCONSIN DELLS

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**Independent
Insurance**
Agents of **Wisconsin**

EMERGING LEADERS

SCHEDULE OF EVENTS

WEDNESDAY, JULY 18

2pm -4pm **How to Prevent Agents E&O: Pollution Coverage Gaps in Commercial General Liability and Commercial Property Policies (1 CE)**

Dustin Helmenstine, American Risk Management Resources

Learn the details of the pollution exclusion commonly found in General Liability and Property policies using claim scenarios.

4pm-6pm **Wilderness Escape Room**

A Leadership Conference first, 12 attendees at a time will have 60 minutes to solve clues and puzzles and navigate their way out of either The Basement Room or The Hotel room, located on-site at the Wilderness Resort.

5pm-8pm **Poolside Cabana**

Grab some food and a drink and relax! The poolside cabana is back and you don't want to miss it! **Sponsor: SECURA Insurance**

THURSDAY, JULY 19

8am-9am **Breakfast**

9am-9:30am **Welcome Presentation: Emerging Leaders Committee Update**
Dan Lau & Ryan Waite [Main Conference Room](#)

9:30am-11am **Building the Digital Customer Experience**
Jeff Roy, President & CEO Excalibur Insurance Group [Main Conference Room](#)

There are pivotal moments in every business category where success can be rendered simply by changing your perspective, or angle of approach.

The consistent thread for every company who wants to build a tribe of raving fans is simple.

Stop thinking "Digital Technology" and start creating "Emotional Relevance".

Join Jeff Roy as he takes you under the hood and shares his team's path to humanizing the digital experience. You'll learn why they exist as a brand, and how they implemented a multi-faceted digital strategy to evoke emotional relevance as a fundamental element of their customer journey. Learn how Excalibur generates 450 to 600 quotes every month and has developed a sales process to give their prospects and clients a unique experience.

11:15am-12pm **Insurance Employee Experience**

Una Roy, VP Operations Excalibur Insurance Group [Main Conference Room](#)

During this 45-minute presentation, Una Roy covers what she will explain as the

"Excalibur Culture". Participants will learn what Excalibur does to keep the team motivated to go above and beyond and provide a WOW experience to their clients.

12pm-1pm **Lunch**

1pm-2pm **Roundtable – Insurance Industry Technology Experts**
Moderator: Matt Banaszynski [Main Conference Room](#)

Hear from the experts on the latest technology trends impacting the insurance industry and how your agency can stay one step ahead. **Panel:** Greg Kirsch, Ansay & Associates; Bob Van Beek, Secura; Pete Weigel, Midwest IT

2:15pm-4:15pm **"How to Become a Social Media Rockstar" including a special presentation on "Creepy Facebook Ads"**

Spencer X Smith, Founder of SpencerXSmith.com [Main Conference Room](#)

Social media is the best means ever invented to grow both your personal reputation as well as that of your organization. Spencer will share stories and strategies that have worked for him and that you won't hear anywhere else.

5:30pm-9pm **Backyard Patio Party** [Wilderness Resort Outdoor Patio](#)

After a day full of interesting topics and conversation, it's time to relax on the patio at the Wilderness Resort. We will have plenty of food and drinks, plus outdoor games for everyone to enjoy.

FRIDAY, JULY 20

8am-9am **Breakfast**

9am-11am **Federal and State Data Privacy Laws: Are You Compliant? (2 CE)**
Bill Larson, NetGen Data Security Consulting [Main Conference Room](#)

Improve your understanding of the Gramm-Leach-Bliley Act ("GLBA") with respects to the law and its importance to insurance agents and the impact of non-compliance on a carrier relationship and contracts.

11:10am-12pm **Cyber Risk: What Are the Threats and How To Be Protected? (1 CE)**
Edward Chang, SVP Cyber Risk Management Travelers [Main Conference Room](#)

He has prosecuted Romanian phishers, Nigerian fraudsters, and other computer hackers and cyber criminals. Eddie Chang discusses the top threats insurance professionals are facing and the steps to take to protect information as well as your reputation.

12pm **Conference Ends**

FEATURED SPEAKERS



Jeff Roy As the CEO of the Excalibur Insurance Group, Jeff's willingness to invest, will challenge you to be better.

As a leader and coach Jeff is fueled by 3 things - technology, people, and big ideas. He also believes that the pinnacle of innovation for an entrepreneur is best measured by the number of times you've tried something new - and learned from the adventure when it didn't go as planned.

What gives Jeff and his Excalibur team their edge? His peers believe it's because he refuses to wait for someone else to make a difference. In 2016 Roy and Excalibur won Aviva Canada's first Broker's Hackathon. A contest designed to encourage groundbreaking ideas on how technology can enhance the industry.

And you may be surprised to learn that Excalibur Insurance is not in the insurance business; they're in the experience business. As evidenced by the way they've challenged the status-quo, once you start looking at your business that way, it totally changes your perspective.



Una Roy She faces every obstacle, with Everest-like expectations.

In fact, after more than 22 years in the insurance industry, don't even think about throwing a challenge in Una's path unless you're looking for serious results. Some call it leadership, but those who know her best will simply tell you she always had a knack for creating repeatable success and attracting the right people. The reality? Regardless of context, Una loves building a game plan that increase the odds of winning.

She's proven that a well-designed system can attract and empower people to achieve the unexpected. The result? She and her team of volunteers raised an unprecedented \$500,000 in a community with only a population of 3200. As Excalibur's VP of Operations, she's came to the same conclusion years ago - talent doesn't find you by chance. Una believes that first you need to know "what you stand against", and then you need to engineer a system that makes it easier to attract and inspire like-minded people who live to make a difference. As a coach, leader, colleague, wife, mom, volunteer and friend - when it comes to finding a better way to help, Una's always been hardwired for success.

REGISTRATION INFORMATION

The IIAW Leadership Conference registration options (find full descriptions at IIAW.com):

Option 1: Full Registration - \$239 Members; \$259 Non-Members
After June 13 - \$259 Members; \$269 Non-Members

Option 2: Non-Industry Spouse: \$119

Option 3: Children (5 & Older) - \$40. Children 4 & Under - FREE

WATERPARK PASSES

Guests receive waterpark wristbands at check-in and have access to all waterparks on the Wilderness Resort property. Guests may obtain wristbands any time after 12PM even if rooms are not ready until check-in at 4 PM.

CANCELLATIONS

Cancellation request received by June 18, 2018, 2018 will receive a complete refund. After the cut-off date, there is a 72-hour cancellation policy per room. Reservations cancelled prior to the 72-hour mark will be charged a \$30 fee. Cancellations within 72 hours will pay the entire room rate.

HOTEL INFORMATION

Room Rates: July 18 & 19 - \$169.99; July 20 - \$199.99. For reservations, call (800) 867-WILD and note that you are attending the IIAW Leadership Conference. Refer directly to the Wilderness Resort for full reservation and cancellation policies at the wildernessresort.com. The Wilderness Resort is at 511 E Adams St, Wisconsin Dells. The hotel reservation deadline is June 18, 2018. All conference events are hosted at the Wilderness Resort. Conference dress code is resort casual.

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