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Marvin Kelly
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AA&B: What were the major obstacles your members faced in 2008?

Kelly: I think the major issues for the insurance industry and for CPCU is the M&A activity taking place and the impacts it has on bottom lines. As a result, many companies have tightened their budgets on travel and training, so a lot of our members may not have been able to attend CPCU training, our annual meeting, or even their local meetings.

In today's business climate, insurance education is more important than ever. In spite of budget constraints, companies need to know that they are putting themselves at a disadvantage if they stop investing in their employees. CPCUs operate at a higher level. Our commitment to ethics is putting our customers and their interests in front of our own.

AA&B: How are you overcoming these challenges?

Kelly: We use technology to provide our members with more webinars and call-in conferences to avoid the travel issue. We also are tying training more closely to benefit our members and insurers in light of what the industry wants.

AA&B: What are your main goals for 2009, and how will you meet them?

Kelly: The entire industry has a diversity-related hole. The theme for my year as CPCU president is embracing changes, and my big priority is employee recruitment and retention. As the first minority CPCU president in its 65-year history, it's important that I help open up the society and the industry to the world so minorities and young people can see that this is a great industry to have a career in.

We are working closely with Independent Insurance Agents & Brokers of America's Project InVEST to apply some of its innovative ideas to our own recruitment efforts. For example, the

Texas Insurance Department and InVEST are collaborating with educators and insurance company sponsors to create a foundation to recruit more young people and minorities interested in the industry as a career path.

I know how important it is to attract the best and brightest. Four years ago, I worked with the Texas CPCU to help launch an insurance education program with Huston-Tillotson University, a traditionally black college in Austin, Tex. There, insurance professionals volunteer their time to teach insurance classes at no cost to the university, eventually placing these students in internships by partnering with agents, the Dept. of Insurance, and insurers including State Farm, Liberty Mutual and Farmers. CPCU's goal is to reproduce this program in other states as well.

One of my other priorities is to get our members more involved and excited. We have 27,000 members but nowhere near the level of participation I think we should. We're trying to generate interest by increasing community activities, such as participating in the Susan G. Koman Race for the Cure—the kind of activities that make a difference. We also adopt a number of schools and provide a scholarship through golf tournaments. Agents need to use the CPCU designation as a marketing tool to stand apart from others in the industry.

Another goal of my presidency is to have fun. Over the years, insurance has developed the reputation of being stodgy; no wonder we have issues with recruitment and retention. To counter this charge, we're making some changes to our 2009 annual meeting in Denver, including opening it up to non-CPCU members. We also are moving toward a meeting that will provide more social venues and opportunities for younger people to bring their families and encourage them to take leadership positions.