

## **Presenter Guidelines**

Thank you for agreeing to present an educational session at a PLRB event.

All presenters, regardless of their experience level, need to review and comply with the PLRB Presenter Agreement. Please sign/initial pages 1 and 2 and return to the PLRB office. You may scan and email the agreement to [conference@plrb.org](mailto:conference@plrb.org). This will ensure that we continue to provide an outstanding learning experience for the PLRB membership as well as to the claims community in general.

If someone, other than a presenter, wrote or co-wrote the conference materials, they should sign page three as a co-author. Please send that portion of the agreement to PLRB as well.

### **Purpose**

The primary purpose of the PLRB programs is education. Registrants attend your program to learn how to better address specific claims-related issues and challenges. Please make sure you comprehensively cover those issues by identifying, exploring, and suggesting effective responses and solutions to those issues and challenges. Your materials and course outlines should support your stated learning objectives.

## **Session Presentation Overview**

### **The Presentation Process**

- A. Review session title.
- B. Develop learning objectives. Learning objectives are those skills that participants will be able to demonstrate after attending your class.
- C. Develop a topical outline and presentation schedule.
- D. Develop content and support materials.
  1. Arrange materials in logical order.
  2. Rank content according to "Need to Know"
    - a. Must know
    - b. Should know
    - c. Might be helpful to know
  3. Focus on your audience: Who are they? What is their level of experience? What are their issues? Your session will be primarily instructional, but be sure to allow for frequent Q & A and audience participation. If you are presenting a 90-minute program, it might be segmented into 15-minute blocks with 10 minutes of instruction, followed by 5 minutes of Q&A. This will help maintain interest and address the relevant class learning objectives.
- E. Send all requested materials in a timely fashion to the PLRB staff for review according to the Presenter Agreement. For teams of presenters, select one person to collect all material and submit to PLRB, so it is received as a "whole" packet.
- F. PLRB is seeking to minimize paper handouts for all educational sessions. Session materials will be posted on our web-site approximately two weeks prior to the live event. Attendees will be encouraged to download materials through the PLRB web site and/or a Conference App that will be available. During the session, most attendees will participate by viewing documents on their laptop or personal device (tablet, smart phone, or Blackberry) or will print out specific documents for themselves.

If you have document (like "suggested answers") that you don't want posted before the Conference, please let PLRB staff know so the document is not posted until after the Conference. Thus, all session materials for your class will be posted on the web site and on our App.

- G. Advise our staff of your A/V needs.

- H. Present your session -- be sure each presenter has ample opportunity to participate in the presentation.
- I. Evaluate your session and submit ideas and comments to PLRB.

### **Course Materials**

A goal of the PLRB is to create a comprehensive technical resource library for its insurer and affiliate members through the annual collection of high-quality materials and resources from various educational events. Session materials will be made available to all authorized PLRB members through our Web site, [www.plrb.org](http://www.plrb.org). Presenters will receive full attribution for their work. All materials will be posted for at least one full year following the educational program.

Materials should include the following components and content:

- A. Course Outline** -- Serves as a presentation agenda, reflecting the approximate minutes for each major section. Outlines are also required in applications for adjuster continuing education credits with various states. Presenters should use the course outline to create a timeline for the presentation that ensures a smooth flow of information and learning activities. All sessions should conclude on time. Course outlines should allow several minutes at the close for attendees to complete session evaluations. (This outline is your working tool; speakers should decide if the outline is one of their session materials posted online for attendees.)
- B. Course/Presenter Introduction** – A brief course introduction should frame the issues to be covered and engage the attention of participants. Make the case for the importance of your program. This can consist of a brief lecture, a short video, or a PowerPoint presentation.
- C. Learning Objectives** that will be achieved with your program. Learning objectives describe the intended result of instruction. They are distinct from, yet related to, the topics covered in your class. Learning objectives describe what participants will be able to demonstrate after attending your class.
- D. Course Content** – This is the heart of the program and includes:
  - 1. Topics or action items covered
  - 2. Course materials/job aides
  - 3. Course materials that will be covered during your presentation
    - a. May include PowerPoint presentations, case studies, discussion scenarios, demonstrations, articles or white papers that you personally authored or have the publishers' written permission to use in your session, interactive games designed to promote learning, and role playing, etc.
    - b. Session materials should not be promotional in nature.
    - c. Make it fresh, exciting, and relevant to your audience. Be enthusiastic!

### **Session Materials Guidelines**

- All session materials should be provided to PLRB electronically (using Microsoft Word or PowerPoint software) by the scheduled due date. We should not receive the materials piecemeal.
- Materials are reviewed by staff prior to Conference use for educational, antitrust, and technical content.
- You may include the presenters' names, titles, and company names/addresses on a cover sheet if you wish, but corporate letterhead and logos cannot be used throughout

the presentation or PowerPoint. Logos may instead be used tastefully on the first and/or last page only.

- Session materials should not be promotional in nature.

### **Copyright Information**

When relating case studies and problems, please use fictional names and not real names. This includes real-life names that aren't related to the case (i.e., names of celebrities, etc.) Use 1123 Main Street; John Smith, Irene Insured, etc. (you can be clever). Real names can be used if the case study is modeled after the facts of a published court decision.

If you have a picture in your presentation of a private individual or private building, be sure you have written permission from the individual or the owner of the property and written permission from the photographer too. Include a copy of the permission(s) when you submit the presentation to PLRB.

Legal counsel suggests that the best practice is for each photo/image to say in very small font (below the photo), "Photo by Bob Smith with permission" or "Photo Courtesy of ABC Company." Please add this information to each slide with photo and submit to PLRB.

You can also obtain images from other electronic resources. However, be sure to get written permission from the copyright owner. Make sure you clearly indicate the use and purpose and note that the work will be reproduced on the PLRB website after the conference. Microsoft Clipart should not be used. Their website now indicates that their work should not be used for commercial purposes.

## **The Elements of a Successful Presentation**

### **Focus Your Materials On the Participants**

Please keep in mind that participants are claims people at various experience levels and are front-line adjusters, supervisors, and managers. Do not assume that all of the basics are known. Use periodic Q&A sessions to gauge their collective level of understanding before moving on to the next part of the program. Address their issues and concerns, not simply your own. It is more important what they gain or learn, than what you do in your session.

### **Plan the Content Carefully**

- Be sure your content and materials are high quality, succinct, clear, and accurate.
- Relate your planned content to your learning objectives. It should always be clear that your objectives provide the skeleton of your program.
- Create reference materials that support the actions/issues stated in your learning objectives. For example, if one of your learning objectives states that attendees will be able to construct a proper denial letter, create samples that relate to specific types of claims.
- Be original or give credit where credit is due. Create your own materials. If you use materials that are not your own creation, be sure to get written permission to use those materials and convey that written permission to PLRB staff when you submit your session materials for staff review.
- Draw upon the experience of those attending your session by creating scenarios for group discussions during the periodic Q&A sessions. Adult learners like to share their practical experiences as they tackle new learning.
- Challenge the audience by providing information that is new and use the scenarios to integrate the new information into their existing knowledge base.

## **Presentation Methods and Visual Aids**

Various surveys suggest that people retain as much as 80% of what they learn through sight. For most successful sessions, sight provides the most information to participants, and visual aids are encouraged. The use of visuals should occur frequently, regularly interspersed with discussions or audience activity.

### **Methods**

Various breakout session methods can be incorporated to optimize learning. Methods selected should support the goals of the session and challenge the audience.

Examples of different methods include:

- Case Studies
- Demonstrations
- Question/Answer Discussions
- Role Plays/Simulations
- Relevant Games

Brief lectures are best used to convey factual information that will be important to participants. A dynamic lecture is a learning process requiring some audience participation and exciting visuals! Hold lectures to a maximum of 10 minutes before breaking for Q&A.

### **Avoid the Use of Stereotypes and Offensive Remarks**

It is the policy of the PLRB to avoid and prohibit stereotypical language in all Conference communications. This policy has three goals:

- To give equal respect.
- To eliminate stereotypes from claims roles.
- To encourage non-sexist and non-racist attitudes and behaviors.

Using sexist, racist, or other inappropriate remarks or off-color humor is not permitted at PLRB presentations. Remember: Humor is fine; jokes, by contrast, often are not effective presentation tools.

### **Visual Aids**

Visual aids are tools to enhance the session by encouraging multi-sensory learning. Different types of visual aids can be effective in a presentation. These include:

- Flipcharts with markers
- Demonstrations
- Video clips or video tapes (please provide written permission from creators of these if from someone other than yourself)
- Slides
- Sample products

These visual aids are sometimes most effective when converted to computer-based media such as PowerPoint. The most important factor is how well the visual aid clarifies and demonstrates the objectives of the educational session.

Important tips in using PowerPoint presentations:

- Type size must be large enough to be read on the screen.
- Try to have no more than 6 - 8 PowerPoint screens for every 15 minutes of program.
- Present only one key piece of information per slide.
- Avoid too much text on each slide.
- PowerPoint documents using light backgrounds are more readable than those with dark backgrounds.

**Ordering Audio/Visual Equipment**

One presenter representative should order the A/V equipment through PLRB within the timeframes given.

**Microphones**

Depending on room acoustics, microphones are not usually needed in meetings with up to 50-60 persons. Unnecessary use of microphones discourages dialog and frequently disrupts adjoining sessions. With high-ceiling rooms, most speakers should use microphones.

**Flipcharts and Whiteboards**

A flipchart is effective for recording information that needs to be preserved with a small audience. Prepared flipcharts are effective to save session time.

**Evaluations**

Participants are given the opportunity to evaluate the Conference and each session individually immediately after the Conference. Evaluations are beneficial to the presenters, the program committee, and staff, as a means to gauge future presentations and topics.

**Continuing Education Credits**

We will apply for continuing education credits for adjusters from various states, CPCU, and RPA. If your session is selected for CE credits, session materials and other information may be required prior to posted deadlines, depending on the states' requirements.

**Posting Session Materials**

PLRB will post session materials:

- The PLRB will post session materials on our Web site, [www.plrbclaimsconference.org](http://www.plrbclaimsconference.org) prior to the Conference.
- All materials will be copyrighted by PLRB, and authors must sign an appropriate release.
- Conference attendees will have access to the session materials on the PLRB website.

**Privacy Concerns**

Although not related to antitrust, the identities of individuals and other entities must be protected when using actual case studies that are not matters of public record to avoid legal exposure for libel, slander or invasion of privacy. Lawsuits are public records and may be used as *is*. If a lawsuit related to a claim has been filed or decided, indicate the court and case number or citation. In the case of open claim files or claim files settled without legal action, the identities of the parties must be protected. Delete or change such identifying material as names, ages and occupations of claimants (if the occupation or age is relevant), and names of municipalities, schools, hospitals, treating physicians, and so on.

**Commit to All General Responsibilities**

As a presenter, you are responsible for the following:

- Attend planning meetings or participate via conference calls.
- Commit the time required to research and develop quality materials and content.
- Cooperate with other presenters.
- Prepare effective, quality session materials for your assigned session/presentation.
- Meet deadlines.
- Make your own hotel and travel reservations. Presenters may attend other sessions when not presenting their own sessions. Conference registration is complementary for presenters. PLRB staff will register presenters for the Conference

**Review and Follow These Antitrust Guidelines**

The Property & Liability Resource Bureau intends to prevent any violation of antitrust laws at all their meetings and conferences.

Presenters and attendees at the Claims Conference must remember that their respective firms are competitors in the marketplace and that the McCarran-Ferguson Act and the laws of some states provide the insurance industry with only a very limited immunity from federal and state antitrust scrutiny. Therefore, presenters and attendees must exercise care during all presentations and discussions, since even innocuous discussions of certain topics might later be misinterpreted as evidence of collusion.

At the Claims Conference, and all educational, social, and business development events connected with this meeting, there should be no discussion or agreement, formal or informal, express or implied, as to any matters which might give rise to an allegation of violation of antitrust laws. Subjects to avoid include:

- a. rates;
- b. underwriting policies;
- c. marketing strategies; marketing responses to legislative, regulatory, or other developments;
- d. prices or costs of any products or services offered for sale by insurers or purchased by insurers;
- e. individual insurance company positions on coverage issues and other matters of insurance policy interpretation; agreements or understandings relating to claim practices, policies, or positions;
- f. standards by which the performance of any insurer could or should be judged; codes of ethics;
- g. advantages or disadvantages of doing business in particular states;
- h. refusal to deal with, or boycott of, potential insureds or suppliers of products or services; use of particular suppliers of products or services; and
- i. costs or profits of any aspect of any of the above.