

Metamorphosis



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The Canadian Independent Adjusters' Association (CIAA) has been working hard over the past year to re-invent itself through an inclusive and exhaustive strategic planning process.

Change at the Canadian Independent Adjusters' Association (CIAA) doesn't mean throwing out the association's time-honoured traditions and methods. It means applying creative energy to our practices, taking a new look at our membership benefits, breathing new life into the organization and communicating with the entire property and casualty industry, not just our members. It means communicating about who we are, how we make a difference in the claims industry and how people can learn more about the CIAA and the opportunities these changes offer. It means raising the bar on ethics and standards, so the entire industry recognizes that the CIAA is the voice of the professional membership for independent adjusters in Canada and represents the value we bring to the industry.

Change has been in the air since our executive meeting in February 2009, when then-CIAA president Reno Daigle asked me to undertake a

"self-analysis exercise" for the CIAA. At that time, I was the CIAA's second vice president and executive committee advisory chair. The request seemed like a very daunting task. Where to begin?

I took the opportunity seriously and started my research with two Vancouver professionals: the vice president of Concerto Research, a market research firm, and the CEO for ViRTUS, an experience-based leadership and organizational consulting firm. Their advice was loud and clear: survey your stakeholders and hold a creative strategic planning session to review the survey findings and take actionable strategic steps towards change.

STEPS TOWARDS CHANGE

The first step was to conduct an inclusive industry survey to gather feedback and help us gain an understanding of our focus. Our executive director, Pat Battle, gathered preliminary questions and feedback from the executive. I worked with two research firms to determine costs and direction. We chose the survey firm and started moving the process along faster. Once on the road to "change," we began to realize everything costs money. Also, we recognized the importance of communication: if we did the "self-analysis," but we didn't tell anybody, who would really know? What difference would it all make?

Clearly the next step was to solicit other peo-

ple's help. But how were we supposed to gather members for a committee from across Canada and sell them on the idea we needed to re-invent ourselves? Would they believe us if we told them they didn't need to do any "real" work, just show up and do a little planning? Sure they might have to fly all the way to Toronto, but who wouldn't want to come all the way from Yellowknife to "sunny" Toronto?

My conversations with Mary Charman, soon to be my first vice president, Greg Merrithew, soon to be my second vice president, and ultimately the rest of the creative strategic planning (CSP) committee helped me develop a vision of the action we needed to take and how to get there. People like Carol Messervey, Miles Barber, Lesia Yacht, Craig Walker, Pat Battle, Jim Eso, Reno Daigle, Jean-Marc Laurin, John Seyler, Ted Baker and Allan Hart knew that it was a huge commitment to give three days to the association "sometime" in the fall. My full-time job was starting to get in the way of my real job — the "self-analysis" of the CIAA.

REACHING OUT

The nagging questions — "What difference will this work make?" and "Who will care in the end if only a select group know about the changes?" — still bumped in the back of my brain. It became clear that to change our association, and to have an impact on the profession of independent adjusting, we needed to reach out to all our stakeholders, both internal and external. We worked hard with Concerto Research to plan the survey to engage stakeholders: members, non-members and industry stakeholders. Next, we needed to connect face-to-face and present our survey results to key stakeholders: both our members and the people who use our services daily. I had many conversations, but the ones with Peter Hohman, CEO of the Insurance Institute of Canada (IIC), provided me the tipping point in terms of direction.

The project grew like a monolithic frog sitting on the edge of my desk waiting to be fed. What was the next step? If we wanted to communicate with the in-

dustry at large, we needed stakeholder sponsors to help us deliver our message to the industry. We needed key industry stakeholders to give us face-to-face advice on how we could change. These two pieces were key!

Ultimately we received an excellent response to our survey requests, our sponsorship needs and also our stakeholder focus group. Stakeholders like Don Forgeron, president of the Insurance Bureau of Canada (IBC), showed he

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understood the vision when he emailed saying: "This sounds like an impressive undertaking and I congratulate CIAA for its proactive outreach to stakeholders and for its capacity to embrace change...[Change is] a theme that is very important to me in my new role at the helm of IBC and one we will be focused on in the years ahead." The advice we received from stakeholder participants during our "focus group," in which the survey results were delivered to the CSP committee and the industry stakeholder group, was immeasurable. It provided a great starting point for the next day two days of creative strategic planning. We also realized significant gains by hiring a professional facilitator, Rick Evans, who brought all the loose ends together.

STAKEHOLDER GROUP

Our very impressive stakeholder group included Ted Hellyer, vice president of programs at the Insurance Institute of

Canada; James Geuzebroek, manager of communication at IBC; Justin MacGregor, president of the Insurance Brokers Association of Canada of IBAC and executive vice president at Martin Merry & Reid; John Welton, secretary of the Ontario chapter of the Canadian Insurance Claims Managers Association (CICMA) and associate senior consultant at Transformation Dynamics; Michelle Reid, vice president of the Ontario Risk and Insurance management Society (ORIMS) and risk manager at Technical Standards & Safety Authority (TSSA); Carmen Place, past president of Canadian Defence Lawyers (CDL) and a partner of Lindsay Kenney; Bob Grouchy, assistant vice president of claims at Allianz Global Risks; Carol Jardine, president of the CUMIS General Insurance Company; Keith Shakespeare, chief operating officer at the Canadian Universities Reciprocal Insurance Exchange (CURIE); Heidi Sevcik, vice president of claims at Gore Mutual; Mark Weir, manager of special projects and claims at Intact Insurance; and Joel Baker, chair of the National Insurance Conference of Canada (NICC) and the principle of the *Baron Quarterly Outlook*.

Our CSP committee included Mary Charman, Greg Merrithew, Pat Battle, Ted Baker, Miles Barber, Reno Daigle, Jim Eso, Allan Hart, Jean-Marc Laurin, Carol Messervey, John Seyler, Craig Walker, Lesia Yacht and me — Patti Kernaghan.

The independent adjusting profession has a collective impact on consumers. We are a large group communicating with consumers on our stakeholder's behalf. As a professional association, we want to ensure our members are served by the best direction and priorities. We will soon be providing the results of our survey and the new CIAA strategic plans; this will be part of our ongoing efforts to work collaboratively within the industry for change in the claims field through new directions and priorities in the coming years. We have much to share over the next few months to enhance our value to the membership and industry at large. ≡