Progress Through Sharing Knowledge

2017-2018 Marketing Plan

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IASA 2018 POWER UP!

EDUCATIONAL CONFERENCE & BUSINESS SHOW

JUNE 3 – 6, 2018 | GAYLORD OPRYLAND | NASHVILLE, TN

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1. Background Information

The Insurance Accounting & Systems Association, Incorporated (IASA) is a non-profit, education association that strives to enhance the knowledge of insurance professionals, and participants from similar organizations closely allied with the insurance industry by facilitating the exchange of ideas and information. IASA is one of the insurance industry's largest, and most well represented trade associations. IASA membership includes insurance companies of all types (Property & Casualty, Life, Health, Fraternal, HMO and others) as members, as well as companies serving the insurance industry, regulators and also organizations more broadly representative of the financial services industry, including banks and investment brokerage firms.

a. Mission

The mission of IASA is to initiate, enable and facilitate the exchange of educational information, best practices and innovative ideas among insurance related professionals to enhance the effectiveness of these individuals, their employers and the insurance industry as a whole.

b. Vision

We will develop and produce “best of class” educational and networking opportunities, at an affordable cost, in a manner that attracts members and volunteers, allowing them and their companies the opportunity for enhanced growth and continued success.

c. Membership

Membership in the IASA is on a company basis and there are three classes of membership based upon the size and complexity of the organization. Membership in the IASA is available to insurance carriers, solution providers, associations and regulatory bodies. Licensed insurance carriers are classified as Regular Members and all other organizations are classified as Associate Members.

IASA Membership numbers as of June 30, 2017:

Membership Category	# Organizations	# Individuals
Regular Members	**664**	
Standard Company Membership	650	
Fraternal	*12*	
Life & Health	*159*	
Multi-Line	*57*	
P&C	*404*	
Reinsurance	*18*	
Holding Company Membership	13	
Small Company Membership	2	
Associate Members	**548**	
Standard Company Membership	510	
Holding Company Membership	14	
Small Company Membership	24	

d. Volunteers

IASA Members (both Regular and Associate) actively help execute on the programs and services of the association to reach annual goals, as well as serving in leadership roles on both the Board of Directors and the Management Team.

As of June 30, 2017, the number of volunteers is:

Active Volunteers	# Organizations	# Individuals
Regular Member Volunteers	52	62
Associate Member Volunteers	74	109
Virtual Volunteers (Regular)	2	2
Chapter Volunteers	115	164

e. Leadership

IASA is led by an Executive Director and a Volunteer President (who serves for a one-year term), with oversight by a Board of Directors. The Executive Director manages the IASA staff, the President oversees the Management Team, and the Immediate Past President acts as Chairman of the Board of Directors.

f. Management Team & Committees

The Management Team consists of the following individuals, collectively leading the following Volunteer Committees where noted:

- **President –** Celeska Fredianelli, Audit Manager, Aegis Security Insurance Company
- **President Elect –** Beech Turner, Vice President, Finance, Assurant
- **IASA Executive Director –** Joe Pomilia
- **IASA Executive Vice President –** Rod Travers
- **CFO –** Carlos Correa, VP, US Technology Manager, Liberty International Underwriters
- **CIO –** Anil Chacko, Manager, Advisory Services Practice, Ernst & Young LLP
- **VP, Chapters –** Ann Wiesler, Consultant, Cardinal Investment Advisors, LLC
- **VP, e-Learning –** Jessica Lasher, Director of Treasury Operations, National Life Group
- **VP, Education –** Doug Ramsey, Vice President, Personal Insurance, Travelers
- **VP, Executive Education –** Laurie Macklosky, 2VP Strategic Planning & Execution, Travelers Insurance
- **VP, Business Show (Exhibits) –** Miguel Edwards, Vice President, Strategy & Operations, Allstate Insurance
- **VP, Marketing & Communications –** Darin Reffitt, VP of Marketing, SPLICE Software
- **VP, Membership & Industry Relations –** Karyn Spaude, Controller, Michigan Automobile Insurance Placement Facility
- **VP, Publications – Scott McEntee –** Vice President, Accounting, Farmers Mutual Hail Insurance
- **VP, Volunteer Development –** Jason Nickles, AVP & Assistant Controller, Western & Southern Financial Group

The Marketing Committee worked with each Committee in developing this Marketing Plan. See appendices for deep-dive information on each Committee's SWOT, programs, goals, challenges, etc.

g. IASA Staff

IASA has a dedicated staff primarily headquartered in Durham, NC led by the Executive Director of the association. Staff members have discrete areas of responsibility and act to support dedicated committees and subcommittees. The staff includes:

- **Executive Director –** Joe Pomilia
- **Executive Vice President –** Rod Travers
- **VP of Conference and Events –** Margaret McKeon, CMP
  - *Committees Supported*: Exhibits, Executive Education
- **VP of Business Development –** Chuck Gunkel
  - *Committees Supported*: Exhibits
- **AVP of Operations and Administration –** Gina Jolly
  - *Committees Supported*: Chapter Advisory, Education
- **AVP of Membership and Marketing –** Tricia Stillman
  - *Committees Supported*: e-Learning, Marketing, Membership & Industry Relations, Publications, Volunteer Development
- **Director of Exhibits –** Kim Morris
  - *Committees Supported*: Exhibits
- **Manager of Member Services –** Sheila White-Smith
  - *Committees Supported*: Executive Education, Membership & Industry Relations, Publications
- **Chapter Services Coordinator –** Angie Gurganus
  - *Committees Supported*: Chapter Advisory
- **Marketing Associate –** Kaitlyn Salguero
  - *Committees Supported*: e-Learning, Marketing, Publication

Staff Support by Committee:

- **Chapter Advisory –** Gurganus, Jolly
- **e-Learning –** Salguero, Stillman
- **Education –** Jolly
- **Executive Education –** McKeon, White-Smith
- **Exhibits –** Gunkel, McKeon, Morris
- **Marketing & Communications –** Salguero, Stillman
- **Membership & Industry Relations –** Stillman, White-Smith,
- **Publications –** Salguero, Stillman, White-Smith
- **Volunteer Development –** Stillman

h. Key IASA Initiatives

i. External Programs & Events

Below are the significant current & recent events and initiatives executed by IASA:

- **Accounting Seminars** – Delivered in partnership with RR Donnelley at Chapter events.
- **Chapter Events** – IASA Chapters host local/regional educational & networking events throughout the year, including conferences, golf outings, and social events that vary subject to the needs of the individual Chapter membership.
- **EDGE** – Seminar for senior executives, on hiatus since 2015. Historically, tied into Fall Planning Meeting.

- **Educational Conference & Business Show** – IASA's premier event, with a number of related initiatives executed in conjunction with the annual event, including:
    - **Business Show** – 200+ vendors/partners/media exhibiting.
    - **Chapter Officers' Workshop** – Sunday morning deep dive for Chapter Officers who are attending the annual conference.
    - **Educational Track: Accounting, Risk, & Finance** – More than 35 sessions plus a super session.
    - **Educational Track: Career Skills Development** – 12 sessions plus a super session.
    - **Educational Track: Technology** – 30+ sessions plus a super session and IT Town Hall.
    - **Executive Education Program** – Roundtables for senior executives, including:
        - *Chief Financial Officer Roundtable*
        - *Chief Information/Technology Roundtable*
        - *Chief Investment Officer Roundtable*
        - *Chief Operating Officer Roundtable*
    - **Exhibitor Mini Boot Camp** – Last executed in 2014, this was a 90 to 120-minute educational event for exhibitor attendees occurring on Sunday afternoon.
    - **Keynotes** – High-profile speakers are contracted for breakfast sessions each of the three days of the conference.
    - **Networking Event** – Tuesday evening sponsored capstone event with music, food, beverages, games, dancing, etc.
    - **Vendor Connect Tours** – 20 targeted exhibit tracks of up to 10 vendors per tour during dedicated exhibit hall time.
- **e-Learning Webinars** – Ongoing continuing education primarily targeted to Insurance Carriers, delivered throughout the year. CPE credits are offered for a majority of the webinars.

- **Scholarship Program** – Annual program offering scholarship dollars to undergraduates pursuing Insurance-focused degrees.
- **Solution Provider Summit** – Annual educational event for insurance-focused sales and marketing professionals. Historically, tied into Spring Planning meeting.
- **Statutory Accounting Seminar** – Delivered in partnership with RR Donnelley in conjunction with Chapter events.
- **Surveys/Polls** – Quarterly virtual initiative on varying topics, with participation and results limited to IASA membership.
- **Technology Innovation Award** – Award program honoring companies that demonstrate the most innovative use of technology at an insurance company. Traditionally tied to EDGE program and Annual Educational Conference.
- **Top 30 Under 30** – New in 2017, recognizes 30 outstanding young insurance professionals from within IASA member companies.
- **Virtual Business Show** – New in 2017, online initiative for vendors from the business show to deliver ongoing promotion of offerings within specific categories.

ii. Internal Programs & Events

Below are the significant current & recent events and initiatives executed by IASA:

- **New Volunteer Program** – Recruitment & onboarding of new volunteers (Regular, Associate, & Virtual)
- **Planning Meetings** – Occur in the Spring & Fall (March & September)
- **VIP Program** – Onboarding program (part of New Volunteer program) – limited duration program for assisting new Regular members in participating in planning meetings
- **Volunteer of the Year/New Volunteer of the Year/Chapter Excellence Award** – Annual awards program with nominees submitted by peers. Winners are selected during Spring Planning, with winners announced during the annual conference.

iii. Publications

IASA issues several publications for educational and informational purposes, including:

- **Annual Report** – compiled in August/September and distributed in Winter edition of The Interpreter
- ***eInterpreter* Newsletter** – Monthly newsletter sent via email to all members.
- **Textbooks** – Property & Casualty and Life, Accident, & Health editions with biennial updates, available for purchase in both digital and printed versions.
- ***The Interpreter* Magazine** – Delivered three times per year, up to six complementary subscriptions per member with additional subscriptions available for purchase.
    - **Conference Preview Insert –** Special section of *The Interpreter* in the Spring edition.
    - **Post-Conference Insert** – Special section of *The Interpreter* in the Summer edition.

iv. Other Communication Channels

In addition to *The Interpreter* Magazine and the *eInterpreter* Newsletter, IASA also delivers information via the following channels:

- **Chapter Officer Newsletter** – Periodic newsletter sent to Chapter Officers.
- **Chapter Event Communications** – Includes save the date, registration open, and registration reminders. – *See Appendix 1 for more details*
- **Digital Advertising** – IASA places digital advertisements online with targeted websites like diginsurance.com, primarily around promotion of the annual conference.
- **Direct Mail** – IASA has used direct mail for promotion of various initiatives and events, including the annual conference, the EEP Roundtables, the Technology Innovation Awards, EDGE, and the Solution Provider Summit.
- **e-Learning Webinar Series Newsletter** – newsletter sent to all constituents/full database promoting e-Learning initiatives.
- **Exhibitor e-News Newsletter** – Periodic email sent to IASA exhibitors with updates and information for the business show.
- **Press Releases**
- **Print Advertising** – IASA leverages print advertising primarily in support of the annual conference, in partner publications like Digital Insurance, ITA, and others.
- **Social Media** – IASA broadcasts across a number of social media channels, including Twitter, Facebook, LinkedIn, Google+, Instagram, and YouTube.

- **Volunteer Viewpoint Newsletter** – Periodic email to IASA national volunteers sent pre- and post- planning meetings and pre- and post-conference with information about meetings, initiatives, and updates.
- **Website** – IASA hosts marketing content, promotions, resources, and registration functionality online at IASA.org. This website also acts as the portal for access to committee files and archives for IASA volunteers.

2. SWOT Analysis

Below is a high-level overview of strengths, weaknesses, opportunities, and threats facing IASA. *For SWOTs at a program/committee level, see individual charts within the appropriate appendices.*

Strengths	Weaknesses
• Volunteers • Educational Program • Financials • Chapters • Networking • Low Overhead/High Value	• Volunteerism Pressures/Limits (Time) • Lack of Agility • Generalist Orientation of Content • Vendor Revenue Concentration • Brand Awareness
Opportunities	**Threats**
• New Content Delivery Options/ Expectations • Tailoring Content - Specialization • Appeal to Younger Demographic • Target New Customers • Grow Market Share	• Expense Management/Budget Cuts (re: member companies) • Alternative (Free) Sources of Content • Changing Demographic • Mergers & Acquisitions (Members Solution Providers) • Competition – ex. InsureTech Conferences

3. Goals

Below are the high-level Marketing Goals of IASA for 2017-2018, including significant Committee-level goals. Numbers below match back to the IASA Operating Plan. *For more detailed Committee-level goals, see individual goals sections within the appropriate appendices.*

Chapter Advisory

- **Goal 4.2**: Support Marketing/Social Media needs of Chapters.
- **Goal 5.2c**: Continue to assist individual chapters with their social media goals and complete the process of migrating individual Chapter LinkedIn groups into IASA's main LinkedIn presence.

e-Learning

- **Goal 1.4**: Continue to grow overall attendance of e-Learning offerings while maintaining the retention rate.
- **Goal 1.5a**: Promote the Virtual Business Show to Exhibitors to get a minimum of 50 VBS Exhibitors and at least 2 Exhibitors per Vendor Connect Tour.
- **Goal 1.5b**: Promote the Virtual Business Show to IASA Regular Members once Exhibitor goal is reached.

Education

- **Other Goal**: Support Education in promoting educational sessions via social media & other channels

Executive Education

- **Other Goal**: Support Executive Education in promoting Roundtables via social media, collateral, & other channels

Exhibits

- **Goal 5.4:** Plan, design and implement 2017 - 2018 primary (Print and Web) and secondary (grass roots recruiting) marketing campaigns for the Annual Conference. Strive to increase attendance over prior year, targeting 1,600 attendees in Nashville.
- **Other Goal**: Support Exhibits in promoting Conference initiatives via social media, collateral, & other channels
- **Other Goal**: Support Solution Provider Enrichment in promoting Solution Provider Summit (TBD)

Marketing & Communications

- **Goal 5.2b**: Improve relevance/value of Social Media for members in order to encourage engagement.
- **Goal 5.2a**: Continue to execute and adapt the Social Media strategic plan.
- **Goal 5.4:** Plan, design and implement 2017 - 2018 primary (Print and Web) and secondary (grass roots recruiting) marketing campaigns for the Annual Conference. Strive to increase attendance over prior year, targeting 1,600 attendees in Nashville.
- **Goal 5.5a:** Plan, design, coordinate and implement 2017-2018 marketing campaigns for other events and products.
- **Goal 5.5b:** Develop a comprehensive communications overlap across touchpoints (email, direct mail, webinars, etc.) for a one-stop view of all channels.
- **Goal 5.5b:** Continue to strengthen the knowledge of IASA Name and Products. Grass roots marketing effort to meet goals for all events and products.
- **Goal 5.5c:** Determine if we renew the subscription to the SNL Database. If it is decided that we renew, determine how to integrate the database into the overall marketing plan.
- **Goal 5.6**: Enhance and maintain plans to engage in partnerships with every significant industry publication.
- **Goal 5.12**: Conduct periodic pre- or post-event polls to solicit member feedback. *A pre-event Executive Roundtable poll must be conducted as determined by the Executive Roundtable committee.*
- **Goal OP# TBD:** Enhance/refresh IASA website *(wording to be clarified from revised Operating Plan)*
    - SEO
    - Look/feel
    - Blog?

Membership & Industry Relations

- **Goal 5.1a**: Support Membership to develop strategies to get more members to participate in IASA offerings.
- **Goal 5.1b**: Assist Membership in promoting benefits of membership.
- **Goal 5.3**: Promote IASA to Young Professionals in Insurance at Chapter and National level.
- **Goal 5.9**: Support Membership in promoting/obtaining Scholarship Program donations from companies and individuals.

Publications

- **Goal 1.7**: Create and Implement a marketing strategy specifically for IASA textbooks.
- **Other Goal**: Support Publications in promoting publication articles/issues via social media

Volunteer Development

- **Goal 3.4**: Support marketing needs of Volunteer development to achieve goals to maintain or grow the total number of Regular Member (Insurance Carrier) volunteers, including a special focus on former Chapter Officers

4. Strategies

Below are top-line strategies of IASA for 2017-2018. *For additional Committee-level strategies, see the individual goals sections within the appropriate appendices. – To be established at Fall Planning Meeting.*

- **Strategy 1**: strategy here
- **Strategy 2**: strategy here

5. Tactics

Below are general tactical approaches to be pursued in the execution of the 2017-2018 Goals*. For specific tactical plans see tactics sections within the appropriate appendices.*

a. Print Advertising

- **Interpreter –** we typically include conference, membership, and e-Learning advertisements. The e-Learning advertisements are not specific to a certain webinar, they are generic about all webinar offerings.

  Commentary: "It would be great to have a plan for advertisements needed in the next year and have me create them. That will help to keep the budget down and we will be able to increase the variety of advertisements in our publications."

- **Co-marketing agreements –** we provide both print and electronic banner, full-page, half-page, and web adverts. This includes a range of about 5-7 magazines (Digital Insurance, ITA, The Record, Risk & Insurance, etc.) Timing: Heavily in March – June for conference.

  Commentary: "t would be beneficial to broaden our co-marketing agreements to accommodate other adverts throughout the year; not just conference. This would allow for more exposure for e-Learning webinars, textbooks, exciting keynotes at chapter events, etc."

- **Conference –** we include print advertisements at the booths, as well as at the IASA booth. We were including printed materials in the "meeting in a box" for chapters, but have since gone to a digital promotion via Microsoft PowerPoint. Note: More videos are planned for chapter events in the coming year.

b. Online/Digital Advertising

- **Co-marketing –** See sub-section above for digital advertising initiatives via co-marketing.
- **eInterpreter/Chapter Officer eBlasts –** there are typically a textbook and conference banner advertisements. Again, it would benefit the organization to have rotating advertisements each month in addition to the conference advert. We can make these banners in house to keep costs down and increase the variety.
- **IASA Website –** Online banners are used on the IASA website. There is a rotating banner on the home page, but the maximum number of adverts in that section is four. We need to make sure we are utilizing this key space appropriately throughout the year, taking ads down immediately when they become irrelevant.

c. Content

- **Promotional Videos –** this year, we plan to continue to increase our video footage, including videos at chapter events, planning meetings, and conference. Below are examples of what we currently have on our YouTube channel. If we can increase our viewers enough, YouTube will actually pay us to allow advertisements, etc. on our videos.
    - Virtual Business Show
    - Textbooks
    - e-Learning Webinars
    - Carolina Chapter Event
- **Brochures –** NEED MORE! Currently we have:
    - Roundtable Brochures
    - Conference Directory

d. Direct Mail

- **Annual Conference Mailing**
- **Other Opportunities –** Direct mailing is something we need to really think about because it takes time and money. Not certain we need to increase mailings in addition to our conference mailing. It uses a lot of resources and not sure if it actually gets past the mail room. Note: email is overwhelming. Studies show direct mail response is on the rise because it is becoming increasingly more rare.

e. Email Marketing

Besides ongoing e-newsletters, regular email marketing includes:

- **Conference eMails –** multiple conference blasts are sent introducing keynotes, sponsors, etc.
- **Webinar emails –** sent out promoting specific webinars.
- **Solution Provider Summit –** sent out promoting the Summit including various sessions and speakers.

  Commentary: "We need to be cautious not to send too many emails end up in spam folders. Also, we need to be sure our eBlasts are direct. We can include a lot of content, but we need a purpose to what we are sending and that needs to be very clear in the main area of the blast."

f. Telemarketing

- **Exhibitors/Sponsors –** Chuck does outgoing calling to potential exhibitors and sponsors.
- **Scholarship Program –** Members of the Scholarship Committee do outbound calls to colleges to promote the scholarship.
- **Solution Provider Summit –** Historically, members of the SPEC committee have done outbound calls to get attendees to the Boot Camp+/Summit.

g. Public Relations/Publicity

Historically, we use Business Wire to issue releases and have used press releases to announce:

- **Award Winners –** Such as the Technology Innovation Award winners.
- **Organizational Changes –** Such as the announcement of Rod Travers joining the IASA staff.
- **Event Announcements –** Historically we have announced the Solution Provider Summit – Not sure if this was released via Business Wire.

  Commentary: "We could be stronger in this area, announcing keynotes, etc., but would need to budget for this."

h. Website/SEO

- **Content –** we handle the content on our website.
- **Hosting & SEO –** hosting capabilities and SEO are handled by a third party.

  Commentary: "We certainly need to make sure our keywords are acceptable and that we are complying with recommendations that would favor our relationship with Google and other search engines. DEFINITELY an area to follow up in. We can talk more about this."

6. Tools & Resources

a. Marketing Liaisons

Marketing Liaisons will be assigned to each Committee and—where necessary—Subcommittee based on need. The Marketing Liaisons will be members of the Marketing Committee and (where possible) members of the assigned Committee. In addition to his/her role on the assigned Committee, the Marketing Liaison will be tasked with acting as Marketing's eyes and ears into the Committee's activities, looking and listening for opportunities to support the efforts of the committee. The Marketing Liaison will work as needed to develop tactical marketing plans for the Committee initiatives, bringing them back to the Marketing Committee to ensure resources and budgets are allocated where needed and possible, and that Marketing stays on-brand and on-time. Note that the Marketing Liaison will not necessarily be carrying out the work within the plan, but will act to ensure that the goals and milestones are met and keep the other members of the Marketing Committee informed.

b. Content Providers

- **Pat Speer –** reference for industry contacts and writer on hot topics in the industry.
- **Susan Douglas –** press releases. Sent via Business Wire.
- **Regis Coccia –** Cover Story Writer – Subject to change in future
- **Johnson Lambert –** Tax Corner - eInterpreter
- **Dennis Sullivan –** Executive Corner Interview – Interpreter

c. Marketing Agencies

- **Varadero Communications –** Michael Molanphy handles all external design needs

d. CRM Systems & Databases

- **iMIS –** Central database used for managing contact/member data
- **eCommunities –** a data warehouse and distribution channel for volunteers to leverage in executing on the programs & services of IASA

e. eMail Marketing Systems

- **MagnetMail –** Used for email blasts for all newsletters

f. Social Media Tools

- **Social Pilot –** Used for scheduling social media posts on Twitter, Facebook, and LinkedIn.
- **Hashtracking –** Used to measure performance of hashtags during events.
- **Bitly –** Used for tracking click performance on links in social media posts.

g. Website Tools

- **Google Analytics –** Used for measuring website performance and engagement.
- **Content Manager –** used to manage and update the iasa.org website.

Note: Website pulls info from iMIS as well.

7. Marketing Committee/Marketing Liaisons

Below are the members of the Marketing Committee, including assigned Committees for Marketing Liaison roles:

Last Name	First Name	Category	Liaison To	Other
Reffitt	Darin	Member	CSD	VP-Marketing
Andersen	Margo	Member	Publications	
Carroll	Melis	Member	eLearning	
Cliffel	Sonia	Member	Membership	
Cotter	Susan	Member		Chair: Surveys & Polls
Deville	Verneita	Member	TBD	
Dugan	Nikki	Member	Volunteer Dev.	Chair: Social Media
Fredianelli	Celeska	Member		President
McKeown	Margaret	Member		Staff
Pomilia	Joe	Member		Staff
Ruffin	Julie	Member	Exhibits	
Salguero	Kaitlyn	Member		Staff
Stillman	Tricia	Member		Staff
		Member	Chapter Advisory	
		Member	Education – ARF	
		Member	Education – Tech	
		Member	Exec Education – CFO	
		Member	Exec Education – CI/TO	
		Member	Exec Education – CInvO	
		Member	Exec Education - COO	

8. Measurement

- How do we measure success?
- To be established at Fall Planning and ongoing.

9. Calendar of Events

Below is a high-level calendar of events for IASA at the National level. *For a list of Chapter, e-Learning, and/or Publication deadlines, see the appropriate Committee appendices.*

a. July 2017

- July 1: IASA Call for Papers Opens

b. August 2017

- Aug 7: Summer *Interpreter* in mail (Content closed 6/9; Materials due 6/16) – *Post-Conference Issue*
- Aug 16: August *eInterpreter*
- Aug 17-19: IASA Summer Meetings, Durham, NC
- Aug 31: IASA Call for Papers Closes

c. September 2017

- Sept 13: September *eInterpreter*
- Sept 22-24: IASA Fall Planning Meeting, Denver, CO
- Sept 25: Materials Due – Fall/Winter *Interpreter*

d. October 2017

- Oct 18: October *eInterpreter*

e. November 2017

- Nov 15: November *eInterpreter*
- Nov 17: Fall/Winter *Interpreter* in mail (Content closed 9/18; Materials due 9/25)

f. December 2017

- Dec 13: December *eInterpreter*

g. January 2018

- Jan 10: January *eInterpreter*

h. February 2018

- Feb 14: February *eInterpreter*
- Feb 15: Materials Due – Spring *Interpreter*/Pre-Conference Insert

i. March 2018

- Mar 7: March *eInterpreter*
- Mar 16-18: IASA Spring Planning Meeting, Phoenix, AZ

j. April 20182017

- Apr 18: April *eInterpreter*
- Apr 18: Spring *Interpreter* in mail (Content closed 2/1; Materials due 2/15) – *Pre-Conference Issue*

k. May 2018

- May 16: May *eInterpreter*

l. June 2018

- June 3-6: IASA Annual Conference and Business Show, Memphis, TN
- June 15: Materials Due – Summer *Interpreter*/Post-Conference Insert
- June 20: June *eInterpreter*

m. July 2018

- July 18: July *eInterpreter*

n. August 2018

- Aug 10: Summer *Interpreter* in mail (Content closed 6/8; Materials due 6/15) – *Post-Conference Issue*
- Aug 15: August *eInterpreter*

Appendices

Appendix 1: Chapter Advisory Committee

This committee is comprised of Chapter leaders who serve in an advisory capacity and are responsible for providing information and assistance to existing chapters and strengthening the relationship between International IASA and the Chapters.

SWOT Analysis

Strengths	Weaknesses
• Chapter Officer Workshop – revised format resulted in more engagement. • Chapter Officer Quarterly Conference Call – Keeping all officers on same page. • Chapter Officer Online Resource Page – Providing additional info and resources to support. • Penetration into Young Professionals demographic – Getting the next generation of IASA leadership engaged at local level. • IASA Staff who assist in chapters with meeting planning and promotion. • Improved chapter adoption of social media over the past few years.	• Lack of engagement in Chapter Excellence Award nominations process – need more nominations. • Lack of broad Chapter Officer participation in workshop and quarterly calls – dedicated people participate, need more penetration in other chapters. • Not holding Chapter Officers accountable for annual goals/results. • Lack of sponsor engagement in chapter events aside from a few dedicated ones. • Lack of technology programming/ participation in most chapter events – impacts sponsorships. • Drop-off in chapter event attendance in recent years.
Opportunities	**Threats**
• Enhance programs and increase participation at Chapter events • Create a master database of resources of preferred speakers/sponsors/vendors etc. to provide for Chapter events • Sharing on what successful Chapters do to sell vendors on chapter sponsorships • Enhance programming with tech sessions where possible • Increased social engagement across chapters.	• Lack of participation at Chapter events threatens next generation of national volunteers/attendees. • Not keeping Chapter Officers/ members engaged can result in Chapters fading (FL/RM examples). • Not having strong leadership in individual Chapters threatens individual Chapter success.

• Promote scholarship program at local Chapter level to reinforce industry value. • Build more excitement around Chapter Excellence Award.	

Subcommittees:

Below are the subcommittees within the Chapter Advisory Committee:

- **Chapter Officer Newsletter** – Joanne Kearbey, Chair
- **Chapter Officer Workshop** – Tip Tipton, Chair

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Chapter Advisory Committee in the 2017-2018 year:

- **Quarterly Chapter Officer Conference Calls** – share ideas regarding successes and challenges
- **Annual Chapter Officer Workshop** – share ideas and network with fellow Chapter Officers
- **Artwork Request Form** – chapters can request Kaitlyn put together a flyer type for chapter to send out to promote their chapter conferences/meetings
- **Creating a Chapter speaker/sponsor database**
- **Chapter Liaisons** – each chapter is assigned a volunteer from the Chapter Advisory Committee
- **Chapter Officer Newsletter** – sent out 2-3 times per year (always a struggle to gather info from chapters about their events to put in the newsletter)

Committee Goals:

Below are the key goals the Chapter Advisory Committee for the 2017-2018 year:

- **Goal 3.1** – Continue to focus on a balanced mix between regular and associate volunteers both at the National and Chapter level.
- **Goal 3.2** – Continue volunteer awards program and additional ways to recognize volunteer participation.
- **Goal 3.4** – Focus on former Chapter Officers to grow the number of volunteers.
- **Goal 4.1** - Support the Florida Regional event. Evaluate the revitalization of Rocky Mountain.
- **Goal 4.2** - Continue to provide National office support and make enhancements as appropriate for Chapter events. Define an implementation strategy to begin charging National member vs non-member pricing at the local level.

- **Goal 4.4** - Conduct Chapter Officers Workshop and Chapter Officers Reception. Conduct at least one internet based training session(s) for Chapter Officers. Conduct regular Chapter Officer conference calls.

Committee Strategies:

Below are the key high-level strategies being leveraged by the Chapter Advisory Committee for the 2017-2018 year:

- **Chapter Membership Drive** – using data from SNL.
- **Evaluate Chapter Structure** – geographies/organization/gaps of Chapters.
- **Social Media** – Increase use of social media to promote events and engage attendees.

Committee Tactics:

Below are the anticipated tactics planned by the Chapter Advisory Committee for the 2017-2018 year:

- **Email Campaign** – promoting value of Chapters (part of master Membership Drive).
- **Social Media Section in Chapter Newsletter** – guidance from N. Dugan.
- **Social Media Calls** – Monthly call with Chapter reps on Social Media-cross share ideas, themes, etc.
- **Brand Guide** – guidelines for all Chapters for IASA Brand requirements & templates with pre-set fonts.
- **Chapter Volunteer Spotlight in eInterpreter** – Needs to be updated/refreshed.

List of IASA Chapters:

- Carolinas
- Central Illinois
- Chicagoland
- Desert States
- Georgia
- Indiana
- Land O'Lakes
- Metro New York/New Jersey
- Michigan
- Mid-Atlantic
- Mid-South
- Midwest
- Northeastern
- North Carolina
- Ohio
- Southwestern Ohio
- Pacific Northwest
- Rocky Mountain
- South Florida
- Southern California
- St. Louis
- Sunshine
- Tampa Bay
- Texas
- Utah
- Wisconsin

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

Calendar of Chapter Events:

July 2017

- July 27 - IASA Texas Chapter Summer Conference 2017

August 2017

- August 16 - Carolinas Chapter Annual Summer Conference 2017
- August 21 - Southwestern Ohio Golf Outing 2017
- August 24 - Georgia Chapter Summer Meeting 2017

September 2017

- September 11 - Central States Regional 2017
- September 13 - Chicagoland Chapter Fall Conference
- September 13 - Midwest Chapter Golf Outing and Fall Conference 2017
- September 13 - Combined Mid-Atlantic & Metro NY/NJ Meeting 2017
- September 18 - Wisconsin Chapter Golf Networking Event
- September 20 - Michigan Chapter Fall Conference & Golf Outing 2017
- September 22 - Wisconsin Chapter Fall Conference 2017

October 2017

- October 15 - IASA Florida Regional Chapter Fall Conference
- October 17 - Wisconsin Chapter Golf Networking Event
- October 29 - Mid-South Chapter Conference 2017

November 2017

- November 10 - Southwestern Ohio Fall Banquet 2017
- November 16 - Northeastern Chapter Annual Conference 2017
- November 17 - Texas Chapter Fall Conference 2017
- November 20 - Ohio Chapter Fall Conference 2017
- November 21 - Land O Lakes Chapter Fall Conference 2017

December 2017

- December 7 - CA Regional Meeting 2017
- December 15 - Carolinas Winter Meeting 2017

January 2018

-

February 2018

-

March 2018

- March 19 - Wisconsin Chapter Spring Conference 2018

April 2018

- April 26 - Midwest Chapter Spring Conference 2018

May 2018

-

June 2018

-

Appendix 2: e-Learning Committee

This committee is responsible for developing content and delivery mechanisms for the presentation of virtual education programs to IASA members and customers within the insurance industry. These classes will be suitable for financial, technology and operations professionals.

SWOT Analysis

Strengths	Weaknesses
• Leadership – Strong committee leaders delegating to their teams • Energy – Lots of ideas being offered and people willing to do the work to make them happen • Willingness to try new things • Everyone on the committee is engaged and charged with a task or goal • Committee members are well networked with other committees and know the other work in IASA	• Not yet able to offer CPE for on-demand webinars • Not enough lead time in promoting events ○ Need registration open sooner for earlier social promotion • Repeating topics monthly/quarterly/annually – some need to be, but can use additional topics
Opportunities	**Threats**
• CPE for on-demand webinars: in process • Virtual education initiative expansion • Sponsorship of e-Learning webinars ○ Monetize & increase field of speakers • Additional cross-committee collaboration w/ membership, chapters, etc. • Promote non-member registration - $50 for live events (per person) • Create a “call-for-speakers” approach to getting content and speakers • Promote “group” live CPE • Test social promotional ads (LinkedIn)	• Lack of a competitive analysis of available virtual educational offerings w/CPE • Lack of engagement in the actual webinars by other volunteers • Sponsored webinars being perceived as “commercials” could hurt program engagement

Subcommittees:

Below are the subcommittees within the e-Learning Committee:

- **Webinar Production** – Chris Mason, Chair
- **Virtual Learning** – Scott Bowen, Director
- **Public Relations** – Don MacFarland, Chair
- **Social Media** – Melis Carroll, Chair
- **Strategic Planning** – Emily Brawley, Chair

Key Initiatives/Programs:

Below are the key initiatives being pursued by the e-Learning Committee in the 2017-2018 year:

- **Launch e-Learning Sponsorships** – sponsor a webinar; name recognition, maybe a speaking opportunity, but not a commercial
- **Textbook Launch Marketing** – handing off to Publications but already in place to complete in the summer
- **Group-Live CPE** – promote the lunch & learn approach to getting CPE

Committee Goals:

Below are the key goals the e-Learning Committee for the 2017-2018 year:

- **Goal 1.4a** - Conduct at least 12 education webinars for the year. Continue to conduct a mix of internal and educational webinars.
- **Goal 1.4b** - Explore opportunity for a "one" step registration process. Evaluate automating data transfer from ON24 to iMIS.
- **Goal 1.4c** - Achieve 4.0 average rating overall for the fiscal year.
- **Goal 1.4d** - Continue to grow overall attendance of offerings while maintaining the retention rate.
- **Goal 1.4e** - Initiate one more submission to NASBA to receive approval to provide CPE accreditation for "On Demand" Webinars.
- **Goal 1.4f** - Implement sponsorship program. Generate $XX in revenue from XX sponsored webinars
- **Goal 1.5a** - Evaluate the viability of creating Virtual Conference.
- **Goal 1.5b** - Evaluate the viability of creating Learning Management Modules.
- **Goal 1.5c** – Virtual Business Show: Secure a minimum of 50 Exhibitors by end of 2017 calendar year.
- **More people on the e-Learning Committee** – increase by XX?
- **Launch P&C Textbook** – XX number of sales.

Committee Strategies:

Below are the key high-level strategies being leveraged by the e-Learning Committee for the 2017-2018 year:

- **Test Paid Social Media Ads** – Targeted LinkedIn Advertising
- **Fall Campaign** – Group Live CPE
- **Spring Campaign** – On-Demand CPE

Committee Tactics:

Below are the anticipated tactics planned by the e-Learning Committee for the 2017-2018 year:

- **Social Promotions** – Earlier registration & promotion
- **Chapter Push** – Promote at all chapter events - ongoing

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

(Still to be completed with scheduled e-Learning events).

Calendar of e-Learning programs:

July 2017
- July 22: How to Act Like an Entrepreneur

August 2017
- August 29: Expense Management and Budgeting Trends

September 2017
- September 27: Excel Proficiency Series: Tips & Tricks: Dashboards

October 2017
- October 12: 2017 NAIC Summer Meeting Review

November 2017
- Date TBD: Cyber Security

December 2017
- December 7: Economic Outlook 2018
- December 18: Key 2017 Annual Statement Changes/GAAP Update

January 2018
- Date TBD: 2017 NAIC Fall Meeting Review

February 2018
-

March 2018
-

April 2018
- Date TBD: Economic Outlook 2018

May 2018
- Date TBD: What Exhibitors Need to Know/VCG Participation
- Date TBD: VCT Leader Training
- Date TBD: Membership Booth Training

June 2018
-

Appendix 3: Education Committee

This committee is responsible for the education content of the Annual Conference, included within the Accounting, Risk Management and Finance, Technology, and Career Skills Development tracks. The Education Committee also supports the development of other non-conference educational events for the Association.

SWOT Analysis

Strengths	Weaknesses
• Continuing Education Credits/Accredication • Relevance of Topics – Focus on Urgency (need to know) and Relevance (new & upcoming) • Practicality of Topics – What are people doing today and what's coming in the near future? • ARF – Strong foundation content plus technology focus - how is technology helping in Accounting/Risk/Finance? • Professional Development – Balanced content between relevant day-to-day and honing leadership skills • Technology – Relationship with GIA is helping to give more of an InsureTech flair • Seasoned faculty of speakers supporting the programs • People in the industry are picking the topics most important/relevant each year. • Investment in paid keynotes for super sessions has raised the quality. • Conference App – Materials and PDFs housed within has increased value of takeaways • Real-world examples for cases, not just theory (Technology)	• Rare instances where session can turn into a sales pitch – session ratings generally reflect this • Vetting of content is decentralized to volunteers who may not see that the content has become too sales-pitch oriented until within the session. • Presentation formats all being similar – slide by slide presentations in front of room, etc. • Same speakers on same topics year after year can get stale. • Sometimes the best/smartest content experts aren't the best/most dynamic presenters.

Opportunities	Threats

• Build in more interactivity
• Introduce session design philosophy around "How do we deliver this content?"
  ○ Presentation Styles
  ○ Panel Formats
  ○ Roundtables
  ○ Group Breakouts
  ○ More Conversation
• Continue to invest in high-quality keynotes for SuperSessions
• Dedicated Space for Tech Tank
  ○ Limited (if any) competing sessions should increase engagement
• Capture Social Media Info when confirming speakers
  ○ Personal/Company Twitter Handles
  ○ Personal/Company Instagram Handles
  ○ LinkedIn Profile Link
  ○ Facebook Profile Link
• Promote TechTank – Digital Promos
• Improve Positioning of Conference – Not just about Finance (comment from Advisory Board Member)
• Provide more guidance on how to do a good session submission & get a spot in the educational tracks
	• Up-and-coming Technology conferences could impact our attendance and our presenter availability
	  ○ DigIn
	  ○ InsureTech Connect
	• Need to improve transparency in how our volunteers talk about the program attendance/engagement
	  ○ Hyperbole around "no one attends sessions at XX time because of YY" – Numbers don't concur.
	• Failure to keep the program "fresh" could result in lost attendees
	• Cost pressures & economic challenges at carriers could push people to explore local/online education initiatives.
	• Cost pressures & economic challenges at solution providers could limit number of experts who are available to present content.

Subcommittees:

Below are the subcommittees within the Education Committee:

- **Accounting, Risk Management, & Finance (ARF)** – Margarete Chalker, Director
- **Professional Development** – Tina Nacy, Director
- **Technology Program** – Beth Bartlick, Director
- **SuperSessions Committee** – Billie Midgett-Gordon, Chair

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Education Committee in the 2017-2018 year:

- **Annual Call for Papers** – open from July 1-August 31, including the solicitation, submission receipt, and review of session proposals for the 2018 Annual Educational Conference & Business Show.
- **TechTank** – Tuesday afternoon interactive session with InsureTech focus
- **SuperSessions** – Keynote caliber speakers – one program SuperSession per day during the conference
- **Program Time Changes** – Shifts in timing of programs especially in Tuesday afternoon 90-minute sessions.

Committee Goals:

Below are the key goals the Education Committee for the 2017-2018 year:

- **Goal 1.1** – Create and deliver a quality program that covers all emerging regulatory and industry trends. More emphasis should be placed on providing opportunities to create interaction, incorporate technology (Audience Response/Polling) and encourage group participation in the technical sessions. Continue to upgrade program with high profile speakers (including paid speakers) within and outside the industry especially as it pertains to Super Sessions and Professional Development. Incorporate additional Life/Health focused sessions into the A.R.F. program.
- **Goal 1.1a** - Achieve a minimum overall program rating of not less than 4.0.
- **Goal 1.1b** - Tech Tank should continue and should be raised to a higher profile type session.

Committee Strategies:

Below are the key high-level marketing strategies being leveraged by the Education Committee for the 2017-2018 year:

- **Comprehensive Social Media Promotion** – Social Promotion of all sessions beginning in December, especially key for SuperSessions and Tech Tank.
- **Digital Marketing** – Promote TechTank via Digital Advertising; Targeted Promotion of Conference to Insurance Technology Professionals

Committee Tactics:

Below are the anticipated marketing tactics planned by the Education Committee for the 2017-2018 year:

- **Social Info Gathering** – Session coordinators to gather social media information on all speakers in Fall 2017.
- **Digital Channels** – LinkedIn/Facebook/Instagram.

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

Appendix 4: Executive Education Committee

This Committee is responsible for identifying and planning any special seminars which IASA sponsors in addition to the Annual Conference.

SWOT Analysis

Strengths	Weaknesses
• Strength 1	• Weakness 1
Opportunities	**Threats**
• Opportunity 1	• Threat 1

Subcommittees:

Below are the subcommittees within the Executive Education Committee:

- **Chief Financial Officer Roundtable** – Tim Wiebe, Director; Ryan Hanson, Vice-Chair
- **Chief Information/Technology Roundtable** – Claire Burke, Director
- **Chief Investment Officer Roundtable** – Robert Firoz, Director
- **Chief Operating Officer Roundtable** – Cindy Boyle, Director

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Seminars Committee in the 2017-2018 year:

- **Initiative 1** – initiative information.
- **Initiative 2** – initiative information.

Committee Goals:

Below are the key goals the Seminars Committee for the 2017-2018 year:

- **Goal 1** – goal information.
- **Goal 2** – goal information.

Committee Strategies:

Below are the key high-level strategies being leveraged by the Seminars Committee for the 2017-2018 year:

- **Strategy 1** – strategy information.
- **Strategy 2** – strategy information.

Committee Tactics:

Below are the anticipated tactics planned by the Seminars Committee for the 2017-2018 year:

- **Tactic 1** – tactic information.
- **Tactic 2** – tactic information.

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

Appendix 5: Exhibits Committee

This Committee is comprised of individuals from companies actively participating as an Exhibitor at the IASA Annual Educational Conference and Business Show. They are responsible for overseeing all facets of the Annual Business Show and finalizing any and all exhibits related arrangements pertinent to exhibitors at the Annual Conference.

SWOT Analysis

Strengths	Weaknesses

• Well-defined process for business show/exhibit hall/Vendor Connect Tours
• Good reputation RE: attendance, value/price ratio and efficient processes
• Strong, experienced IASA team behind executing business show activities
• Vendor Connect Tours: good results and ratings each year
  ○ Improved VCT leader/kickoff process each year
• Exhibit Hall Game: Drives traffic and engagement
  ○ Simplicity of game in 2017 drove more participation
• SPEC: Committee taking ownership this year – lots of new ideas
	• Perception that interest/traffic in exhibit hall has dropped in recent years
	  ○ Need to focus on energy level in hall
	• Exhibit Hall Game – Not all vendors know about/understand/use the game to drive traffic
	• Vendor Connect Tours: Reliance on volunteers as tour leaders has caused issues historically
	  ○ 2017 process of assigning tour leader roles seemed to improve process
	• SPEC: Amount of volunteer involvement as both speakers and attendees
	• SPEC: Location tied to Planning Meetings impacts success
	  ○ Locations
	  ○ Times of years – heavy conference season
	• SPEC: Struggles financially
	  ○ Tried keynote and mailing in 2017 – both increased costs
	  ○ Attendance down in 2017 after increasing in 2016
	• SPEC: Lack of Sponsors
	• SPEC: Need to beef up marketing efforts

Opportunities	Threats
• Capitalize on InsureTech movement • Improve Gallery Wall placement/impact • Exhibit Hall Game: Continue to focus on fun and reasons to engage with vendors • SPEC: Looking at doing more sessions at Summit specifically about conference success • SPEC: Focus on InsureTechs as an audience – don't necessarily know Insurance industry • SPEC: Increase focus on innovation	• InsureTech conferences could cannibalize our Exhibitors and Attendee pool • Cost pressures at carriers could impact travel budgets/attendance • Budget constraints at solution providers could impact booth sales/sponsorships

Subcommittees:

Below are the subcommittees within the Exhibits Committee:

- **Exhibit Hall Game** – Tim Herrmann, Chair
- **Solution Provider Enrichment Program** – Heather Dunn, Director
- **Vendor Connect Tours** – Sylvia Grotowski & Franks Petersmark – Co-Chairs

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Exhibits Committee in the 2017-2018 year:

- **Exhibit Hall Game** – Annual game to drive engagement between attendees and exhibitors.
- **Sponsorships** – Managed by IASA staff – opportunities for exhibitors/solution providers to increase brand recognition & visibility.
- **Vendor Connect Tours** – Monday morning sessions with attendees led on tours of specific exhibitors offering key solutions by category.
    - Training via webinar and on-site
- **Solution Provider Summit** – Educational event for Vendors/Exhibitors/Solution Providers focused on the insurance industry.
- **Exhibitor Training**
    - Pre-show overviews via webinar and on-site meeting

Committee Goals:

Below are the key goals the Exhibits Committee for the 2017-2018 year:

- **Goal 1.9** – Evaluate viability of continuing to provide education opportunities to the Solution Provider communities. Determined a "Go, No Go" decision by Fall Planning Meeting for some type of solution provider education at Spring 2018 Planning Meeting.
- **Goal 2.3** – Continue to make the Business Show a well-represented event with unique informational and interactive activities like the game and Vendor Connect Tours. Sell all available square footage.
- **SPEC**: Increase Summit Attendance & Financial Outcome

Committee Strategies:

Below are the key high-level marketing strategies being leveraged by the Exhibits Committee for the 2017-2018 year:

- **Social Media** – Promote business show activities more strongly prior to conference
- **Digital Marketing** – advertise via digital channels as available
- **Video** – Promote Solution Provider Summit and Business Show using video Continue to make the Business Show a well-represented event with unique informational and interactive activities like the game and Vendor Connect Tours. Sell all available square footage.

Committee Tactics:

Below are the anticipated tactics planned by the Exhibits Committee for the 2017-2018 year:

- **Social Media** – Promote VCT Tracks; Promote Exhibit Hall Game; Promote Gallery Wall
- **Digital Marketing** – Explore options for Adwords, LinkedIn advertising,
- **Website** – Enhance website with more video, more imagery.

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

Appendix 6: Marketing Committee

The Committee will provide advice, support, guidance and resources in developing a marketing plan for the Association, any promotional materials required in its operation and will initiate new market surveys.

SWOT Analysis

Strengths	Weaknesses
• Strong recognition for the IASA brand within the industry. • Increased participation/followers over the past four years across most channels. • Dedicated group of followers engaging frequently with content on each channel. • Chapters are engaging socially on multiple channels, increasing brand exposure and engagement • Policies and procedures in place to guide official social media by volunteers at the national & chapter levels.	• Lack of social media content outside of key programming months, especially around the annual conference, Solution Provider Summit, etc. • Lack of templates for social media usage to enable creativity while keeping content on brand. • Lack of engagement for the quarterly Survey/Poll. • Lack of digital marketing – AdWords, SEO, targeted advertising on LinkedIn, Facebook, etc.
Opportunities	**Threats**
• Engage with each Committee via a dedicated Marketing Liaison to actively search out opportunities to promote initiatives and identify potential social media content. • Educate volunteers about social media best practices to encourage submissions of content throughout the year. • Increase participation in Surveys and Polls. • Develop a blog on the IASA website for promotion of IASA programs, publication of unique content, and additional distribution of select articles from the eInterpreter. • Explore digital marketing opportunities via all channels • Increase use of video in promotions	• Social media “incidents” requiring active reputation management – thus far this has not been a significant issue. • Evolution of social media platforms guiding target market away from IASA’s active channels – Example: Snapchat usage among younger professionals.

Subcommittees:

Below are the subcommittees within the Marketing Committee:

- **Social Media** – Nikki Dugan, Chair
- **Surveys & Polls –** Susan Cotter, Chair
- **PR –** Subcommittee under consideration
- **Digital Marketing –** Subcommittee under consideration

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Marketing Committee in the 2017-2018 year:

- **Develop & Implement a comprehensive marketing plan across the organization** – under development; initial plan to be completed in time for the August Management Team offsite meeting.
- **Entrench Marketing Best Practices into the IASA Volunteer Organization** – via regular engagement and interaction educate IASA volunteers on developing and following tactical marketing plans for key initiatives and on the available methods and process for executing on those plans.
- **Promote the Virtual Vendor Connect Tours** – in support of the new program launched just prior to IASA 2017, promote usage of the online VVCT by carriers in order to drive additional participation & revenue from exhibitors.

Committee Goals:

Below are the key goals the Marketing Committee for the 2017-2018 year:

- **Goal 5.2b**: Improve relevance/value of Social Media for members in order to encourage engagement.
- **Goal 5.2a**: Continue to execute and adapt the Social Media strategic plan.
- **Goal 5.4:** Plan, design and implement 2017 - 2018 primary (Print and Web) and secondary (grass roots recruiting) marketing campaigns for the Annual Conference. Strive to increase attendance over prior year, targeting 1,600 attendees in Nashville.
- **Goal 5.5a:** Plan, design, coordinate and implement 2017-2018 marketing campaigns for other events and products.
- **Goal 5.5b:** Develop a comprehensive communications overlap across touchpoints (email, direct mail, webinars, etc.) for a one-stop view of all channels.
- **Goal 5.5b:** Continue to strengthen the knowledge of IASA Name and Products. Grass roots marketing effort to meet goals for all events and products.

- **Goal 5.5c:** Determine if we renew the subscription to the SNL Database. If it is decided that we renew, determine how to integrate the database into the overall marketing plan.
- **Goal 5.6**: Enhance and maintain plans to engage in partnerships with every significant industry publication.
- **Goal 5.12**: Conduct periodic pre- or post-event polls to solicit member feedback. A pre-event Executive Roundtable poll must be conducted as determined by the Executive Roundtable committee.
- **Goal OP# TBD:** Enhance/refresh IASA website (wording to be clarified from revised Operating Plan)
    - SEO
    - Look/feel
    - Blog?
- **Grow Social Media Followers & Engagement** – Increase followers & engagement in line with the following metrics:

Channel	Metric	Baseline	Goal
Twitter	Followers	1,660 as of 9/17	1,800 by 6/30/18
	Retweets/Month		
Facebook	Likes	730 as of 9/17 (after combining)	850 by 6/30/18
	Shares/Month		
LinkedIn	Company Page Followers	839 as of 9/17	950 by 6/30/18
	Discussion Group Members	2,474 as of 9/17	2,600 by 6/30/18
Instagram	Followers	123 as of 9/17	175 by 6/30/18
Google+	Followers		
YouTube	Followers		

- **Increase Survey/Poll Participation** – Increase participation in the quarterly surveys/polls by the following numbers over 2016-2017:

Quarter	16/17 Topic	16/17 Participants	17/18 Goal
Q3 2017	Conference Results	83	200+
Q4 2016	Social Media	89	100+
Q1 2017	Pulse of the Industry	64	150+
Q2 2017	Issues & Priorities	105	150+

- **Increase Website Engagement** – Increase page views and engagement on the following web pages compared to baseline:

- **Introduce Digital Marketing Strategies** – Explore opportunities for AdWords, LinkedIn Advertising, SEO, etc.

Committee Strategies:

Below are the key high-level strategies being leveraged by the Marketing Committee for the 2017-2018 year:

- **Education** – implement an internal training program for volunteers interested in providing social media content to the marketing committee.
- **Education** – Educate the Marketing Liaisons & Committee VP's/Chairs on executing an IASA tactical marketing plan and on the available channels and methods of promotion.
- **Committee Engagement** – Implement Marketing Liaisons for each Committee or large Subcommittee to act as an educator, facilitator, and monitor for Marketing.

Committee Tactics:

Below are the anticipated tactics planned by the Marketing Committee for the 2017-2018 year:

- **Implement a monthly meeting for Chapter social media contacts** – in order to provide Chapters with both a network of people in similar roles and to share best practices.
- **Develop a library of templates to be used for Social Media** – create layouts that can be used for posting to ensure proper logos, fonts, colors are utilized.
- **Develop a blog on IASA.org** – to improve SEO and to provide additional content for social media, tied into the work of the eInterpreter Subcommittee. – *Note: May require the creation of a website subcommittee to focus on site content in support of the IASA staff.*
- **Direct Marketing –** Utilize SNL database in support of Membership/Scholarship Program/Chapter Engagement with targeted monthly email campaign.

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

Appendix 7: Membership & Industry Relations Committee

This Committee is responsible for membership acquisition and retention and advises the Board of Directors in how to better serve member needs.

SWOT Analysis

Strengths	Weaknesses
• Scholarship Program runs as a well-oiled machine ○ Process for program launch, execution, evaluation, etc. all in place • Membership renewal process runs smoothly and on-time • Focus on Young Professionals to continue growing the membership	• Tasks within the committee are three of the biggest growth opportunities of IASA but not fully understood by volunteers • Marketing for both scholarships and membership could be stronger • Lack of engagement in scholarship program by general/non-involved volunteers • Data is tough to get and not shared/ publicized • Known more for financial than technology by our carrier members/non-members
Opportunities	**Threats**
• Stronger marketing to penetrate Young Professionals audience • Stronger marketing of membership to non-member companies • Stronger marketing of membership benefits to member companies • Establish/leverage personal connections with non-member companies and less-engaged member companies • Utilize Chapters to promote benefits of membership • Introduce a member interaction system like Higher Logic to engage members across chapters/ committees/type • Promote technology side of IASA to general membership	• Young Professionals – Failure to engage them threatens future growth of the organization • Scholarship program growing too large could stress our volunteer resources ○ Could outsource if needed – already identified options • Lack of engagement w/technology segment of the industry could hurt overall traction in the future

Subcommittees:

Below are the subcommittees within the Membership Committee:

- **Membership Drive** – Brad DuPont, Chair
- **Scholarships** – Karen Furtado, Chair
- **Young Professionals** - Tracey Howell, Chair

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Membership Committee in the 2017-2018 year:

- **Scholarship Program Applications** – annual program to solicit applications
- **Scholarship Program Donations** – pursue strategies to increase member/individual donations.
- **Membership Drive** – promotional strategies to drive increased IASA membership
- **Young Professionals Outreach** – promotional strategies to engage young professionals and promote IASA benefits to that audience
- **Annual Report** – Annual publication for members/stakeholders

Committee Goals:

Below are the key goals the Membership Committee for the 2017-2018 year:

- **Goal 5.1a** – Increase membership by focusing on companies not currently active in IASA.
- **Goal 5.1b** - Manage non-renewing members.
- **Goal 5.1c** - Work with chapters to implement member vs non-member pricing at the local level.
- **Goal 5.1d** - Develop a strategy to get more members to participate in IASA offerings.
- **Goal 5.1e** - Complete an interview with a minimum of two member companies and produce resulting articles/testimonials for publication in the Interpreter/eInterpreter on the benefits of membership
- **Goal 5.1f** - Evaluate the benefits of membership and determine if there need to be changes or additions.
- **Goal 5.3a** - Evaluate, recommend and or implement additional partnerships and other relationships that will enhance the connectivity with entry level insurance professionals and a younger demographic with ties to IASA's core customers.
- **Goal 5.3b** - Develop education targeted to the Younger Demographic and provide those modules to the Chapters for incorporation into their events.
- **Goal 5.8** - Streamline the IASA Annual Report content. Provide report electronically and/or posted on the IASA website. Consider mailing to official representatives or key constituents.
- **Goal 5.9** - Continue IASA funded scholarships and continue to look at expanding through donations from companies and individuals. Concentrate on expanding scholarship presentations to students that have named accounting and technology career paths within the Insurance umbrella.

Committee Strategies:

Below are the key high-level strategies being leveraged by the Membership Committee for the 2017-2018 year:

- **Implement Individual Donation Strategy** – GoFundMe-type site that will allow individuals to contribute to scholarship fund to increase engagement and personal investment in success of program.
- **Associate Member Donation Strategy** – Promote value of scholarship program to associate members, both feel-good and points-based.
- **Scholarship Video Promotions** – Collect videos with scholarship applications to promote overall program during conference and on website.
- **Membership Drive** – Email campaign using SNL data

Committee Tactics:

Below are the anticipated marketing tactics planned by the Membership Committee for the 2017-2018 year:

- **Social Media** – promotion of all activities across social channels.
- **Video** – utilize video to promote membership, scholarships, volunteering, etc.
- **Marketing Materials** – New Marketing Collateral for membership and scholarships

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

Appendix 8: Publications Committee

This committee is responsible for the publications of the Association, including *The Interpreter*, a quarterly magazine dedicated to supporting the educational mission of IASA; *eInterpreter*, the Association's electronic monthly newsletter; and the textbooks produced by the association.

SWOT Analysis

Strengths	Weaknesses
• Strength/Quality of Content, especially in *The Interpreter*. • Audience – Both the size and the vested interest they have in staying informed. • Trusted Source - Independent nature of our Association means the purpose of sharing the information isn't a factor in readership (not selling them anything). • Level of Professionalism of *The Interpreter* has jumped up in the past few years – quality, appearance, etc.	• Volunteer numbers need to be increased to support current level of content curation • Lack of writers for content – don't need to be committee members • Committee has been working in a silo – not enough partnership with other committees for topic generation and/or writing assistance • Need additional professional writers in the stable for independent research articles and for ongoing content.
Opportunities	**Threats**

• Get other committees to assist in topic development and writing where they are the experts
  ○ ARF
  ○ Professional Development
  ○ Tech
  ○ VolDev
  ○ Etc.
• Committee could be doing additional types of content:
  ○ Case Studies
  ○ White Papers
  ○ Independent Research
  ○ Public Policy Statements/Interpretations
• Repurpose eInterpreter content in other ways – Ex: Blog Posts
• Develop Interactive Content/Discussions on Boards/ Blog/Etc.
	• If outsourced articles become too biased/"salesy" could hurt readership and reputation of the pubs
	• If we bring in other committees as topic developers/writers/consulting partners for content could create perception that Pubs isn't adding value
	  ○ Need to reset understanding of Publications committee – curators/layout/sourcing – not (necessarily) writing!
	• Lack of enough and/or engaged volunteers could hurt long-term output volume or quality of publications

• Examine purpose & strategy behind existing publications:
  ○ Potentially redefine *The Interpreter* – Move beyond Association news to keep more research/thought leadership focused
  ○ Look at organization/content of the *eInterpreter* – amount of content and layout makes it difficult to consume
• Make Publications Committee cool again! – Curators, not writers!	

Subcommittees:

Below are the subcommittees within the Publications Committee:

- **eInterpreter** – Open, Chair
- **Interpreter** – Beth Bartlick, Chair
- **Textbooks** – Connie Jasper, Chair

Standard Interpreter Columns:

Below are the standard columns being included in each issue of the Interpreter in the 2017-2018 year:

- **President's Message** – Current Year President
- **From the Executive Director** – Executive Director
- **Executive Corner** – Regular Nolan Feature
- **Analyst Insights** – No Regular Writer
- **Social Media Article** – Member of Social Media Committee
- **Tax Corner** – No Regular Writer
- **Tech Corner** – No Regular Writer
- **Association News in Each Issue**– No Regular Writer
- **Volunteer Profile** – Volunteer Development
- **Poll Results** – Kaitlyn / Polls Committee
- **Committee Spotlight** – Hard to find writers!!
- **Member Company Spotlight** – Sonia Cliffel has helped consistently.
- **Chapter News** – In-House / Kaitlyn

Standard eInterpreter Columns:

Below are the standard columns being included in each issue of the Interpreter in the 2017-2018 year:

- **News/Notes Section** – Margaret/Rod/Kaitlyn
- **Sponsored Banner** – Sponsor
- **e-Learning Section** – Tricia Stillman
- **Tech Trends** – N/A
- **Career Skills Development** – N/A
- **Tax/Accouting Corner** – Johnson Lambert
- **Chapter Officer Interview** – N/A
- **President's Message** – Current Year President
- **Industry Pulse Link** – Kaitlyn
- **Member Announcements** – Kaitlyn
- **MISC IASA Announcements** – IASA Staff

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Publications Committee in the 2017-2018 year:

- **Interpreter** – 3x per year
- **eInterpreter** – Monthly
- **Textbooks** – Produce online through eLearning webinar

Committee Goals:

Below are the key goals the Publications Committee for the 2017-2018 year:

- **Goal 1.7a** – Complete update of P&C book and make available in electronic and print versions. Determine timing of the next LIFE textbook update.
- **Goal 1.7b** – Assist Marketing committee with the creation and implementation of a marketing strategy specifically for IASA textbooks. Consider re-branding "Textbook" with another term.
- **Goal 5.7a** – Make continuous improvements to the look and feel as well as the content of the Interpreter products.
- **Goal 5.7b** – Continue to research the viability of implementing a simple “tablet” version of the Interpreter.
- **Goal 5.8** – Streamline the IASA Annual Report content. Provide report electronically and/or posted on the IASA website. Consider mailing to official representatives or key constituents.

Committee Strategies:

Below are the key high-level strategies being leveraged by the Publications Committee for the 2017-2018 year:

- **Writer's Guidelines** – Ensure writers guidelines are distributed for all potential writers to keep content on-target.
- **Repurposing Content** – Find ways to repurpose content online, in discussion groups, etc.

Committee Tactics:

Below are the anticipated tactics planned by the Publications Committee for the 2017-2018 year:

- **Social Sharing** – Work with Social Media Committee to ensure that non-IASA articles promoted are clearly non-biased and not perceived as endorsements.

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD

All planned publications by month – Interpreter, eInterpreter, etc.

Calendar of Planned Publications:

July 2017

- Date: July *eInterpreter*

August 2017

- Aug 7: Summer *Interpreter* in mail – *Post-Conference Issue*
- Aug 16: August *eInterpreter*

September 2017

- Sept 13: September *eInterpreter*
- Sept 18: Content closed for Fall/Winter *Interpreter*
- Sept 25: Materials Due – Fall/Winter *Interpreter*

October 2017
- Oct 18: October *eInterpreter*

November 2017
- Nov 15: November *eInterpreter*
- Nov 17: Fall/Winter *Interpreter* in mail

December 2017
- Dec 13: December *eInterpreter*

January 2018
- Jan 10: January *eInterpreter*

February 2018
- Feb 1: Content Closed – Spring *Interpreter*/Pre-Conference Insert
- Feb 14: February *eInterpreter*
- Feb 15: Materials Due – Spring *Interpreter*/Pre-Conference Insert

March 2018
- Mar 7: March *eInterpreter*

April 2018
- Apr 18: April *eInterpreter*
- Apr 18: Spring *Interpreter* in mail

May 2018
- May 16: May *eInterpreter*

June 2018
- June 8: Content Closed – Summer *Interpreter*/Post-Conference Issue
- June 15: Materials Due – Summer *Interpreter*/Post-Conference Insert
- June 20: June *eInterpreter*

July 2018
- July 18: July *eInterpreter*

August 2018
- Aug 10: Summer *Interpreter* in mail
- Aug 15: August *eInterpreter*

Appendix 9: Volunteer Development Committee

This committee is comprised of Chapter leaders who serve in an advisory capacity and are responsible for providing information and assistance to existing chapters and strengthening the relationship between International IASA and the Chapters.

SWOT Analysis

Strengths	Weaknesses
• People & Experience – Most members of committee have led a sub-committee or been a significant contributor before joining VolDev • Passion – All committee members are very passionate about IASA and what it can do for your career, life, etc. • Leadership Development Program – strong focus on this over the past three years has made a difference	• Limited volunteer engagement with specific activities – Recognition/VOTY • Timely communications across committees • Onboarding of new volunteers may only drive limited engagement • Virtual Volunteer program needs to be fully developed and operationalized • eCommunities – is it the right tool? • Volunteer roster needs to be enhanced – Who, what committees, easy reference
Opportunities	**Threats**

• Recruiting more strongly to build a pool of potential volunteers
  ○ Carriers
  ○ Solution Providers
• Continue to drive Leadership Development program & increase transparency
• Branding – “Be a Volunteer” campaign
• Increase recognition of volunteers
  ○ Rising stars
  ○ Anniversary/tenure recognition
	• Bad volunteer experience could hurt recruiting – word of mouth or social posts
	• Risk that targeted programs could make people feel alienated – Everyone should feel engaged and supported

Subcommittees:

Below are the subcommittees within the Volunteer Development Committee:

- **Leadership Development** – Kristine Weber, Chair
- **Mentor Program** – Jose Loera & additional person TBD, Vice Chairs
- **Recruitment & Placement** – Allan Leonard, Chair
- **Virtual Volunteer** – TBD, Chair

Key Initiatives/Programs:

Below are the key initiatives being pursued by the Volunteer Development Committee in the 2017-2018 year:

- **Rebrand & Refresh Volunteer Materials** – align with Membership materials.
- **First Person Stories** – illustrate the experience with personal stories in print and video.

Committee Goals:

Below are the key goals the Volunteer Development Committee for the 2017-2018 year:

- **Goal 3.1a** - Continue to focus on a balanced mix between regular and associate volunteers both at the National and Chapter level.
- **Goal 3.1b** - Continue work to evaluate workloads and time commitments of volunteers.
- **Goal 3.1c** - Continue work to provide structural changes and other opportunities for Insurance Carrier volunteers to participate in a virtual way. Continue to clarify the rules and face to face meeting logistics surrounding Virtual Volunteerism.
- **Goal 3.1d** - Ensure that all National Volunteers are actively participating in all committee activities and supporting volunteer needs at conference.
- **Goal 3.2** - Continue volunteer awards program and additional ways to recognize volunteer participation.
- **Goal 3.3** - Continue to implement additional improvements to onboarding new volunteers.
- **Goal 3.4** - On a net basis we will either maintain or grow the total number of Regular Member (Insurance Carrier) volunteers, including a special focus on former Chapter Officers and get them acclimated to National IASA.
- **Goal 3.6** - Manage the program and improve as needed to create a career path for IASA volunteers to serve in leadership areas. Enhance the linkage between the volunteer leadership development program and the nominating committee process.

Committee Strategies:

Below are the key high-level strategies being leveraged by the Volunteer Development Committee for the 2017-2018 year:

- **Create new recruiting/targeting processes** – to specific carriers
- **Expand volunteer pool** – via Virtual Volunteers, expanding outreach into non-finance/non-IT roles
- **"Be a Volunteer" Campaign** – relaunch campaign throughout the year
- **Know Your Mentors** – Campaign for promoting mentor program and onboarding
- **"Rising Stars" Campaign** – showcase newer volunteers

Committee Tactics:

Below are the anticipated tactics planned by the Volunteer Development Committee for the 2017-2018 year:

- **Social Media Campaigns** – more timely posts with new volunteers, mentors, VOTY/NVOTY nominees
- **Brochure for new volunteers** – tactic information.
- **Videos for new volunteers**

Key Deliverable Dates:

- TBD – Developed as part of plans from/after Fall Planning Meeting
- TBD

Parking Lot for Future:

- TBD – Captured at Planning Meetings
- TBD