

From Service Provider to Mission Champion

How to Maximize Your Relationship
with Your Insurance Advisor

Melanie Lockwood Herman
Executive Director
Nonprofit Risk Management Center
703.777.3504 | Melanie@nonprofitrisk.org



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Webinar Overview



Resources!



Introductions



Maximizing Broker Advisor Services



Final Tips and Takeaways

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Meghan Mullee

- Vice President, Alliant Insurance Services
 - Oversees the Conserve-A-Nation Insurance Program
 - BA, Government/American Politics, the University of Virginia



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Derek Symer

- Principal & SVP, Director, Nonprofit Practice, AHT Insurance
 - Focus areas include education sector, associations, think tanks, NGOs
 - Former Research Historian at the United States Holocaust Memorial Museum
 - BA, History and German, Dartmouth College
 - MA, European History, American University



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Maximizing Broker Advisor Services

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The Insurance Marketplace

What are some of the things happening in the insurance marketplace that are going to make this a tough (tougher?) year for nonprofits?



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Broker/Agent Community

What's happening in the broker/agent community that nonprofit buyers should be aware of?



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Industry shifts and changes

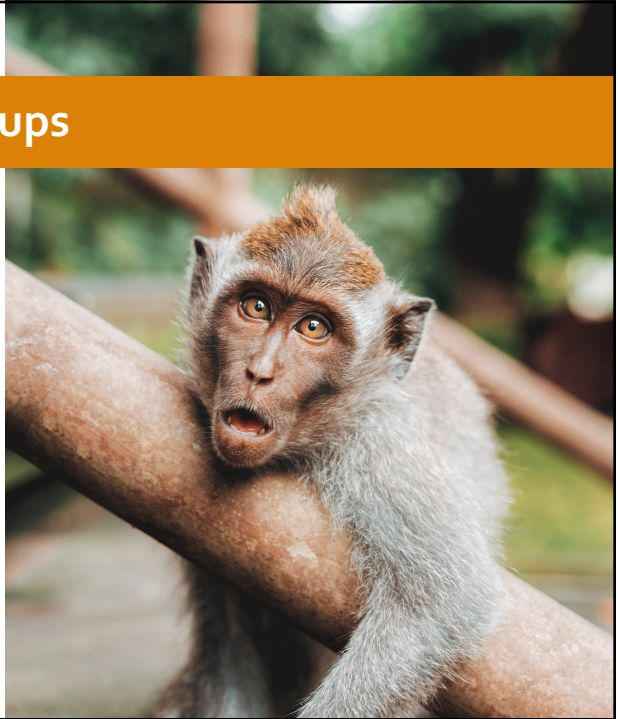
What is the biggest change you've witnessed in the insurance industry since you began working as a broker?



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Misunderstandings and Mix-ups

What are some of the most MISUNDERSTOOD coverages or industry practices?



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Renewal Mistakes

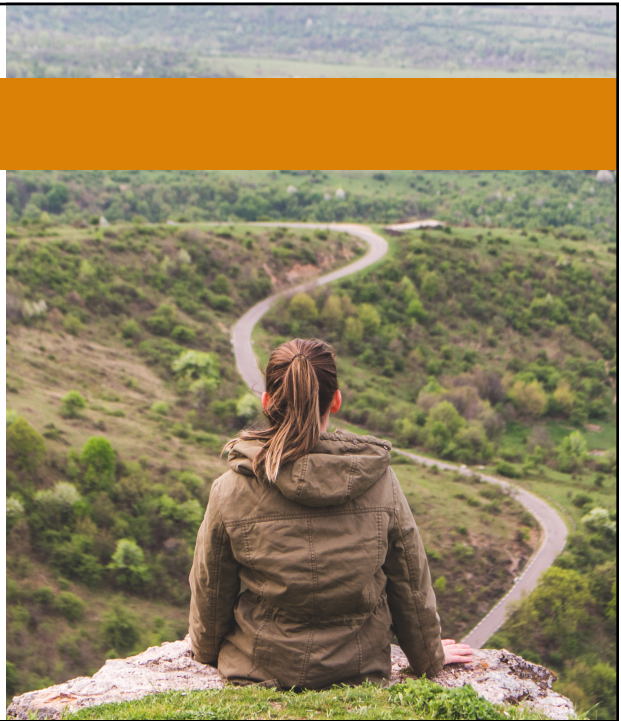
What is a mistake made by nonprofit buyers during the renewal process?



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Must Do

What is the ONE THING nonprofit insurance buyers must do to ensure that their organizations have the coverage they need?



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Final Tips and Takeaways

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Trusted Advisor, not a 'middleman'

- Nonprofit teams that view the broker as a trusted advisor are far more likely to maximize the relationship!

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Resolve to learn!

- Trust your broker's expertise and know-how, but resolve to increase your understanding of everything you buy.
- For example:
 - What's covered
 - What's excluded, and why
 - How the marketplace is changing
 - Claims handling – musts and must nots

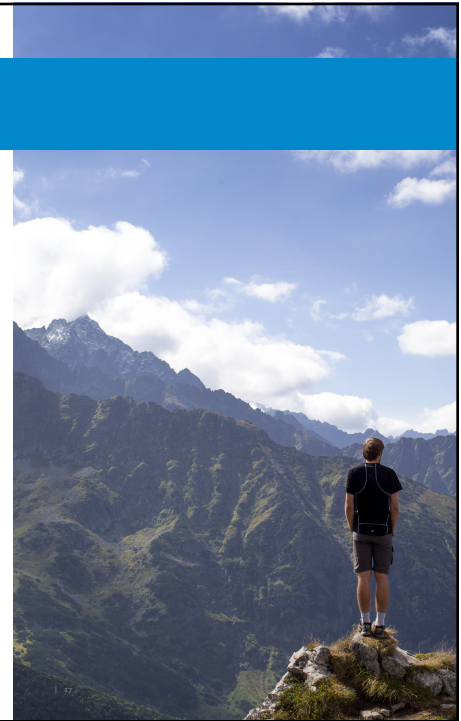


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Be future focused

“The Courage to Lead is a willingness to take risks for the good of an unknown future. And the risks are real. For it is much easier to tinker with the month, the quarter or the year, but **to make decisions with an eye to the distant future is much more difficult.**”

Simon Sinek, *The Infinite Game*



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Peering into the future

- Two years from now, where to we want to be?
- What 5 factors will shape this future?
- What bold risks must we embrace today to get there?



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Resolve to learn; don't fear questions!

"People often hesitate to ask questions because they would rather not gain information that would make them confront a need for change."

– *Questions Are the Answer*, by Hal Gregersen



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Thank you!

Derek Symer 703.220.4982 | dsymer@ahtins.com

Meghan Mullee 703.547.6292 | mmullee@alliant.com

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