Oct. 16-17

San Marcos
Embassy Suites

WELCOME
LUNCH & KEYNOTE

How to Create an Inclusive Culture

IIAT
AGENCY MANAGEMENT FORUM
How-Tos

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AGENCY MANAGEMENT FORUM
How-Tos

Oct. 16-17 | *San Marcos Embassy Suites*

Independent Insurance Agents of Texas
AGENCY MANAGEMENT FORUM

How to Create an Inclusive Culture

Noelle Codispoti, CPCU, ARM

The National Alliance for
Insurance Education & Research

WHY DOES DIVERSITY, EQUITY, AND INCLUSION MATTER?

Step 2: Education

Understand Customers Better

Reach a Wider Audience

Mirror the Market

Greater sense of Belonging and Psychological Safety

Increased Diversity of Talent Pipeline

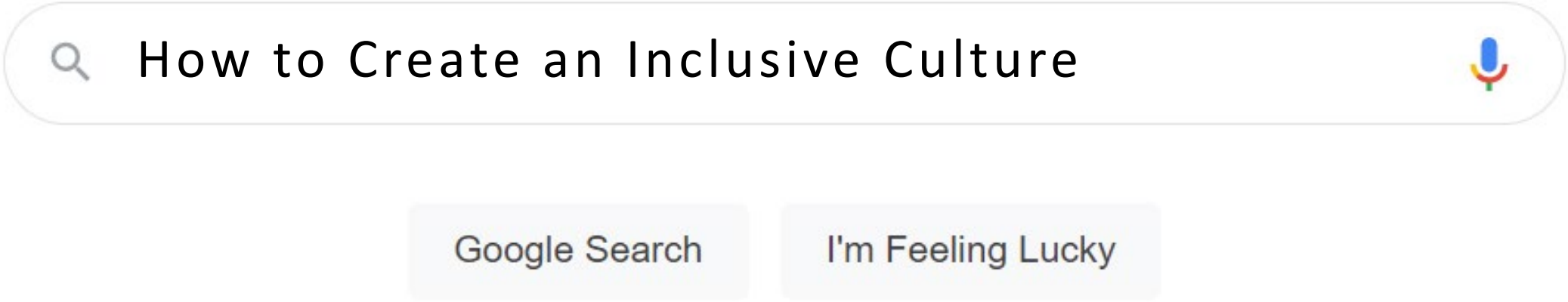
Financial Performance Metrics

DEI Journey

Awareness	Acknowledgement	Aspiration	Action	Accomplishment
External factors Employee/ Customer Demands Leadership "Awareness"	What truths are we proud of? What challenges do we need to acknowledge Company Statements Internal Discussions / Steering Committees	What does our COURAGE and CONVICTION look like? Are we ready to effectuate real change? Who will we be to our employees, customers, and community?	Communicated DEI iniatitves? Integration into core business Performance-driven objectives	Links to compensation Published results and outcomes Talent Pipeline Supplier Diversity

WHAT DOES INCLUSION MEAN TO YOU?

PollEverywhere


Google
How to Create an Inclusive Culture
Google Search
I'm Feeling Lucky

Internet Results

Business News Daily (Aug 2022, Nicole Fallon)

- Start from the Top
- Focus on Recruitment Strategies
- Provide Safe Spaces
- Connect with Employees
- Multiple Ways of Feedback

McKinsey (Feb 2021)

- Measurement of Belonging, Equality and Openness
- Belonging – Share positive connection
- Equality – Equal chance of succeeding
- Openness – Feel safe to express ideas, thoughts, concerns about work

Duke, Center for Advancement of Social Entrepreneurship (2018)

- Leadership must be on Board
- Agree on definition of inclusion
- Understand the needs of the team
- Amplify Others

WHOSE RESPONSIBILITY IS IT?

WHY DOES BEING INCLUSIVE MATTER?

Participation on a team

Access to the field

Trainers

Coaches

Teammates

- Do they love coming to practice?
- Are they excited for the games?
- Do they enjoy being around each other?
- Have I inspired a love for the game?
- Will they tryout next year?

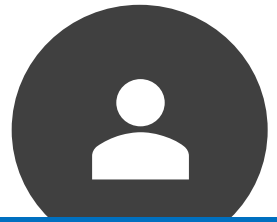
How To Create An Inclusive Culture

SELF-ANALYSIS

EDUCATION

INDIVIDUAL

COMPANY



INDIVIDUAL

COMPANY

Step 1: Self-Analysis

COMPANY

- Employee and customer surveys
- Analysis of customer and community demographics
- Competitor

INDIVIDUAL

- Online surveys on biases
- Self-reflection on situations and interactions

Step 2: Education

COMPANY AND INDIVIDUAL

- DEI Education
- Bias
- Intersectionality
- Microaggressions
- Emotional Intelligence
- Allyship
- Cultural, Generational, Racial, and Gender Education

Step 3: Action

- How do we react? How are we **Proactive**?
- Avoiding Checking the Box
- Avoiding Assumptions
- Acting **Authentically**

A Continuous Cycle of Improvement

Leads to greater employee happiness, productivity, innovation

Business results: client acquisition and retention

Trust, Understanding, Respect, Passion, Engagement

Not showing up as your **AUTHENTIC SELF** is Professional Malpractice

-Andrew McCaskill, May 2019, Diversity Inc Conference

QUESTIONS

Thank you to our Lead Underwriters

THANK YOU

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Independent Insurance Agents of Texas

MEMBERSHIP MAKES YOU **STRONGER**