

Managing the Next Generation –  
April 22, 2008

The Katie School Symposium offers experts from academic institutions, consulting firms, and insurance organizations the unique opportunity to come together and discuss pressing market place issues. This year's symposium will focus on Managing the Next Generation.

The war for talent is escalating. As studies by Deloitte Consulting LLP have revealed, the majority of underwriters, claim adjusters, sales agents and actuaries are reaching the age of retirement without adequate numbers in the workforce to replace them. This year's symposium explains the talent crisis and offers suggestions on how financial services and insurance companies can collaborate to attract, engage and develop employees for future success.

Audience: All levels of financial service management and insurance firms.

## Katie School 2008 Symposium



### Managing the Next Generation — April 22, 2008 Bone Student Center - Illinois State University

Sponsored by: **Deloitte.** and



Agenda	
9:30 – 10:30	<p><b>Current State of the Marketplace</b> <b>Andy Liakopoulos</b> Senior Manager, Deloitte Consulting LLP</p> <p>During the session, Andy will discuss how Talent Management is evolving in the Insurance Industry and strategies to attract, develop, engage, retain, and manage the next generation of Insurance professionals.</p>
10:30 – 10:45	<p><b>Break</b></p>
10:45 – 11:45	<p><b>Executive Panel:</b> <b>Dixie Axley</b> Vice President, Learning and Development, State Farm Insurance Company</p> <p><b>Deanna Frautschi</b> Senior Executive Vice President Human Resources and Communications, Country Insurance and Financial Services</p> <p><b>Sharon Rossmark</b> AVP, Allstate Insurance Company</p> <p><b>Moderator: Leah A. Reynolds</b></p> <p>The panel of experts will lead off with a facilitated discussion of management best practices today and in the future for attracting, training and retaining employees. This will lead to an interactive discussion allowing the participants to openly discuss ways to manage Generation Y while meeting company expectation and goals.</p>

Lunch will be provided in the Bone Student Center's Circus Room	
12:00 – 1:00	<p><b>Lunch</b> Provided in the Bone Student Center's Circus Room</p>
1:15 - 1:35	<p><b>Maintaining, Challenging and Managing the Millennium Generation</b> <b>Jim Jawahar, PhD.</b> ISU Professor and Chair of Management Department</p> <p>Dr. Jawahar's presentation will provide research information on the challenges of managing people across generations and how to develop competencies for Millennium Generation workers.</p>
1:35 – 2:00	<p><b>Generation "Y" Panel</b> <b>Moderator: Jim Jones</b></p> <p>Panel of successful young Insurance professionals will discuss what motivates them in the workplace and the development practices they consider to be most effective for their and future generations.</p>
2:00 – 2:15	<p><b>Break</b></p>
2:15 – 3:15	<p><b>Breakout sessions - Table Topics</b></p> <p>Table topics will be assigned regarding what the industry should be doing to better attract, develop and retain the next generations.</p>
3:15 – 4:00	<p><b>Breakout Session Discussion Summary</b></p>
4:00 – 4:15	<p><b>Wrap-up</b></p>

# Katie School 2008 Symposium

## Andy Liakopoulos, Senior Manager, Human Capital Practice, Deloitte Consulting

Andy Liakopoulos, Senior Manager in the Human Capital Practice of Deloitte, brings more than 15 years of human capital experience to the organization. Andy is the National Talent Management Lead for Deloitte's Financial Services Industry practice.

Andy's experiences in human capital include change management, organization strategy, talent management, human resource transformation and learning development. Andy's consulting engagements include a variety of projects, such as workforce transformation; mergers and acquisitions; process outsourcing/off-shoring; organization restructuring; corporate culture transformation; competency modeling; knowledge management; and performance management.

## Dixie L. Axley, CPCU, CLU, Vice President-Learning and Development, State Farm Insurance Companies

As Vice President of Learning and Development, Axley provides leadership for job skills training, professional and leadership development, and performance improvement operations which provide learning and development solutions to more than 79,000 associates as well as 17,000 agents and their staff.

She joined State Farm in 1987 as a personnel development specialist and was promoted to superintendent in 1988. She became director of Management Planning and Information in the Illinois Regional Office in 1991, where she was named Public Affairs manager in 1993. Axley became Assistant Director – Public Affairs as corporate headquarters in 1995 and was named Director – Public Affairs that same year. She was promoted to Assistant Vice President – Public Affairs in 1996 and Vice President – Public Affairs in 1997, overseeing the corporation's legislative relations, community relations, corporate philanthropy, and internal communications. In 2001 Dixie was named Field Vice President – Learning and Development responsible for shaping the creation of 13 new zone L&D operations until being appointed to her current position in 2002.

## Deanna L. Frautschi, Executive Vice President of Human Resources and Communications, COUNTRY Insurance & Financial Services

Deanna Frautschi has served as executive vice president of Human Resources and Communications for COUNTRY Insurance & Financial Services since April 2002.

Frautschi joined COUNTRY in 1979. She has held several positions, including sales promotion specialist, administrator of Sales Promotion Services, director of Corporate Personnel and executive director of Corporate Personnel. She joined the COUNTRY Management Committee in 1989. She holds a bachelor's degree in advertising from the University of Illinois, Urbana. She also furthered her education and earned an Accreditation in Professional and Human Resources.

## Leah A. Reynolds, National Practice Leader for Generational Change and Total Rewards Communication, Deloitte Consulting, LLP

Leah has an extensive track record designing communication strategies for Fortune 100 companies. Her experience includes work for numerous automobile manufacturers and suppliers, health care organizations and financial institutions.

Leah has developed strategies for organizations during major mergers and acquisitions, spin offs and divestitures, changes in total rewards and human resource policies and shifts in corporate and organizational culture. She is a frequent speaker on generational change as an emerging challenge and opportunity for 21st century organizations. She holds an M.A. degree in organizational communication from Eastern Michigan University.

## Sharon B. Rossmark, Assistant Vice President, Allstate Insurance Company

Sharon Rossmark is an Assistant Vice President of Agency Distribution for the Allstate Insurance Company. The Allstate Corporation (NYSE: ALL) is the nation's largest publicly held personal lines insurer.

Sharon is an accomplished executive with a 30-year progressive career in insurance claims, sales, marketing, and distribution including regional and corporate leadership. Using a proven blend of leadership, communication and process management, she has demonstrated the ability to create effective relationships at all levels of the organization, establish vision, direction and achieve business results. Her style combines strategic creativity and management expertise to ensure integrated, actionable and practical solutions to business challenges.

## Dr. Jim Jawahar, PhD

Dr. Jim Jawahar is Interim Chair of the Department of Management & Quantitative Methods.

Professor Jim Jawahar teaches courses in human resource management and organizational behavior. His research interest areas include performance appraisal, selection, organizational justice, citizenship and counterproductive behaviors, and work-family dynamics. He has published over 34 articles in such journals as the Academy of Management Review, Journal of Management, Journal of Labor Research, Personnel Psychology, and Journal of Applied Psychology. He has presented over 40 papers at National and International Conferences, such as the Academy of Management Conference and the Administrative Sciences Association of Canada. He has received many Best Paper Awards and Research Awards.

## REGISTRATION

**Cost:** \$300 for Non-members, \$125 for Katie School Partners  
(Lunch & Parking Included)

### Registration:

Only online registration available: [www.katieschool.org](http://www.katieschool.org)

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**Questions:** Nancy Barrington (800) 697-8692 or [nkbarri@ilstu.edu](mailto:nkbarri@ilstu.edu)

\*\*\*Additional information and speaker bios are available at [www.katieschool.org](http://www.katieschool.org) in the Industry Events section

