

Thank you for agreeing to present an educational session at a PLRB event! Your presentation will be a fantastic opportunity to represent yourself and PLRB and provide an engaging educational experience for our members. Please take some time to review the following guidelines and learn how to develop and deliver an effective presentation.

## I. Understand your Learning Objectives and Develop the Content

**Understand our purpose.** The primary purpose of PLRB programs is education. Registrants will attend your program to learn how to better address specific claims-related issues and challenges. The goal is to comprehensively cover those issues by identifying, exploring, and suggesting effective responses and solutions to those issues and challenges. Your materials and course outlines should be targeted to support your stated learning objectives.

**Understand your responsibilities.** Becoming a presenter for PLRB pays off when you produce a high-quality educational experience, but it requires commitment. Successful presenters perform the research and work necessary to develop quality session materials which are accurate, clear, and helpful. Co-presenters should work together by planning meetings and/or conference calls to coordinate ideas. There will be deadlines to meet so that everything is in order by the time of the conference. You will also have to be cognizant of privacy, antitrust laws, and attribution rules as you develop your presentation (see the warnings sections below).

**Develop Learning Objectives.** The best place to start is by reviewing the Session Title and identifying the Learning Objectives that will be achieved with your program. Learning objectives describe the intended result of instruction. They are distinct from, yet related to, the topics covered in your class. Learning objectives describe what skills participants will be able to demonstrate after attending your class.

See what others  
have done with  
these  
[Sample Learning  
Objectives \(and  
introductions\).](#)

Get inspired  
with this  
sample  
[Proposal](#)  
and [Outline](#).

**Develop an Outline.** An outline is a flexible working document which will help you arrange your materials in a logical order. You will need to develop one anyway for Continuing Education purposes, so take advantage of the structure to think about the broad strokes of your presentation. Some tips for developing a useful outline include:

- Rank content by “must know,” “should know,” and “should be helpful to know.”
- Think about your audience: Who are they? What are their issues and concerns?
- Plan for a wide range of experience levels. Do not assume the basics are known, but also provide interesting content for your more experienced audience members.

## II. Plan how You will Present the Content

**Start strong.** The first few minutes of your presentation are your opportunity to hook your audience with a positive first impression and engage their interest in your topic. Develop a written brief course introduction which frames the issues to be covered and engages the attention of participants. Make the case for the importance of your program. Plan to begin your presentation with an explanation of who you are and why the topic should be of interest to them. Offer a roadmap of the topics covered and tell attendees about the methods you intend to use to invite them to participate throughout the session.

**For video assistance with learning how to present from presenters themselves, check out these videos:**

[Effective Presentations - The PLRB Way](#)

[Effective Presentations at PLRB](#)

**Present content creatively.** Brief lectures are best used to convey factual information that will be important to participants. Visual aids are tools to enhance the session by encouraging multi-sensory learning. Various surveys suggest that people retain as much as 80% of what they learn through sight. For most successful sessions, attendees retain the most information with visual aids. The use of visuals should occur frequently, regularly interspersed with discussions or audience activity.

Many presenters develop a PowerPoint presentation. With PowerPoint slides, keep in mind:

- Type size must be large enough to be read on the screen.
- Try to have no more than 6 - 8 PowerPoint screens for every 15 minutes of program.

- Present only one key piece of information per slide.
- Avoid too much text on each slide.
- PowerPoint documents using light backgrounds are more readable than those with dark backgrounds.

PowerPoint can and should be supplemented with different types of visual aids, including:

- Scenarios demonstrating key ideas or interactions
- Demonstrations
- Sample products
- Video clips
- Flipcharts with markers. A flipchart is effective for recording information that needs to be preserved with a small audience. Prepared flipcharts are effective to save session time.

**Involve the audience creatively.** Your session will be primarily instructional, but be sure to allow for frequent Q&A and audience participation. This will help maintain interest and address the relevant class learning objectives. A dynamic lecture is a learning process requiring some audience participation and exciting visuals. Hold lectures to a maximum of 10 minutes before breaking for Q&A.

Various breakout session methods can be incorporated to optimize learning. Methods selected should support the goals of the session and challenge the audience.

- At the beginning of the presentation, encourage the participants to ask questions and offer their perspective on issues raised.
- Question & Answer Sessions. Use periodic Q&A sessions to gauge your audience's collective level of understanding before moving on to the next part of the program. Address their issues and concerns, not simply your own. What they gain or learn is more important than what you do in your session.
  - You can pose a question and obtain a response, or ask for a show of hands.
  - Ask who in the audience has been in a certain type of claim or claim situation and ask a respondent to explain their experience and what happened.
- Demonstrations
- Break-out sessions or workshops. Present a claim situation and have participants work in groups to develop a solution or identify the key issues.
- Role-plays or simulations
- Relevant interactive games designed to promote learning
- Walking through a hypothetical, asking audience questions at each stage
- Draw upon the experience of those attending your session by creating scenarios for group discussions during the periodic Q&A sessions.

- Adult learners like to share their practical experiences as they tackle new learning. Elicit examples and experiences from your audience.

Adults like to learn while avoiding harsh judgment. Even if the answer is incorrect, the presenter must find a way to avoid embarrassing the respondent. Nothing chills the atmosphere in a presentation more than participants seeing another person humiliated. One way to handle an incorrect answer may be to say “Thank you, that is one way to address this issue; how about other ideas?”

**Use Case Studies and Examples.** Audiences typically need strong case studies or examples to understand complex ideas. Discussion scenarios, demonstrations, and walking through hypothetical claims are all methods presenters have used to ground ideas in real-world situations. In the past, members have frequently praised presenters who can leverage engaging examples to guide their understanding of complex ideas.

**Focus on the objectives.** As you develop your presentation, keep your eye on the ball by relating your planned content to your learning objectives. It should always be clear that your objectives provide the skeleton of your program. The most important factor in considering visual aids and audience interaction is how well the time spent clarifies and supports the objectives of the educational session.

**Cooperate with co-presenters.** You and your co-presenters will make the best impression if you can work as a team. Work closely with your co-presenters to develop session materials. Review the timing so that each presenter can contribute to the session.

**Hungry for more tips? Check out these other written resources:**  
[What We've Learned About Adult Learners](#)  
[Pointers from a Presenter](#)

### **III. Prepare Required Materials**

**Formalize your outline.** At this stage in the process, once you have planned your presentation more thoroughly, your “work-in-progress” outline should serve as a presentation agenda, reflecting the approximate minutes for each major section. Presenters should use the course outline to create a timeline for the presentation that ensures a smooth flow of information and learning activities. All sessions should begin and end on time, so course outlines should allow several minutes at the close for attendees to complete session evaluations.

Outlines are also required in applications for adjuster continuing education credits with various states. Your three-tiered, timed outline should be provided to PLRB by the due date.

**Gather materials and send them electronically to PLRB all at once.** Your session materials could include:

- Your PowerPoint slides
- Materials, handouts, worksheets, white papers, etc.
- Photos, images, websites, or reference materials. For example, if one of your learning objectives states that attendees will be able to construct a proper denial letter, please include samples that relate to specific types of claims.
- Although your outline is your working tool, some speakers provide it to attendees. Speakers should decide if the outline is one of their session materials posted online for attendees.

PLRB staff will review your materials for educational, antitrust, and technical content before they are posted. Therefore, to ensure a smooth process, please submit them by the due date. Please send all materials in Word or PowerPoint format. If the file is too large to send by email, please use Dropbox, Google Drive, or a similar service to transfer the file.

Put your best foot forward by providing your session materials in one organized packet, rather than piecemeal. For teams of presenters, select one person to collect all material and submit to PLRB, so it is received as a "whole" packet.

**Expect session materials to be electronic.** PLRB is minimizing paper handouts for conferences and meetings. Session materials will be posted on our website, after they are reviewed (and revised if necessary), approximately two weeks prior to the live event. Attendees will be encouraged to download materials through the PLRB website and/or a Conference App that will be available. During the session, most attendees will participate by viewing documents on their laptop or personal device (laptop computer, tablet, or smartphone) or will print out specific documents for themselves.

**Make your handouts electronic with [“Tools to Go Paper-Less for PLRB Presenters.”](#)**

#### **IV. Ensure your Presentation Complies with the Following Caveats**

**Be cognizant of privacy.** The identities of individuals and other entities must be protected when using actual case studies that are not matters of public record to avoid legal exposure for libel, slander, or invasion of privacy. Real names can be used only if the case study is modeled after the facts of a published court decision. Lawsuits are public records and may be used *as is*. If a lawsuit related to a claim has been filed or decided, indicate the court and case number or citation.

In the case of open claim files or claim files settled without legal action, the identities of the parties must be protected. Delete or change such identifying material as names, ages and occupations of claimants (if the occupation or age is relevant), and names of municipalities, schools, hospitals, treating physicians, and so on. When relating case studies and problems, please use fictional names and not real names. This includes real-life names that aren't related to the case (i.e., names of celebrities, etc.). Use 1123 Main Street; John Smith, Irene Insured, etc. (you can be clever).

**Provide proper credit.** Please create original material for your presentation. If you use materials that are not your own, please obtain written permission and provide that written permission to PLRB staff with session materials. For example, if you include a white paper or article in your session materials, obtain the author's written permission to use it. If your presentation includes a video, obtain written approval from its creators. Email approval is acceptable.

Still have  
questions?  
Check out  
PLRB's  
[Copyright  
FAQs!](#)

If you have a photograph or image in your presentation of a private individual or private building, please get written permission from the individual or the owner of the property and written permission from the photographer or creator as well. Include a copy of the permission(s) when you submit the presentation to PLRB.

Microsoft Clipart should not be used. Their website now indicates that their work should not be used for commercial purposes.

Legal counsel suggests that the best practice is for each photo/image to include in very small font (below the photo), "Photo by Bob Smith with permission" or "Photo Courtesy of ABC Company." Please add this information to each slide with photo and submit to PLRB.

Find royalty-free  
(and worry-free)  
images at [these  
links.](#)

You can also obtain images from other electronic resources. Please be sure to get written permission from the copyright owner. Make sure you clearly indicate the use and purpose and note that the work will be reproduced on the PLRB website after the conference.

**Avoid promotional materials.** Presenters' names, titles, and company names/addresses may be included on a cover sheet if you wish, but corporate letterhead and logos cannot be used throughout the presentation or PowerPoint. Logos may instead be used tastefully on the first and/or last page only. Session materials should not be promotional in nature.

**Comply with antitrust guidelines.** Please review and follow the PLRB antitrust guidelines.

The Property & Liability Resource Bureau intends to prevent any violation of antitrust laws at all their meetings and conferences. Presenters and attendees at the conference must remember that their respective firms are competitors in the marketplace and that the McCarran-Ferguson Act and the laws of some states provide the insurance industry with only a very limited immunity from federal and state antitrust scrutiny. Therefore, presenters and attendees must exercise care during all presentations and discussions, since even innocuous discussions of certain topics might later be misinterpreted as evidence of collusion.

At the conference, and all educational, social, and business development events connected with this meeting, there should be no discussion or agreement, formal or informal, express or implied, as to any matters which might give rise to an allegation of violation of antitrust laws. Subjects to avoid include:

- a. rates;
- b. underwriting policies;
- c. marketing strategies; marketing responses to legislative, regulatory, or other developments;
- d. prices or costs of any products or services offered for sale by insurers or purchased by insurers;
- e. individual insurance company positions on coverage issues and other matters of insurance policy interpretation; agreements or understandings relating to claim practices, policies, or positions;
- f. standards by which the performance of any insurer could or should be judged; codes of ethics;
- g. advantages or disadvantages of doing business in particular states;
- h. refusal to deal with, or boycott of, potential insureds or suppliers of products or services; use of particular suppliers of products or services; and
- i. costs or profits of any aspect of any of the above.

**Avoid Offensive Remarks.** It is the policy of the PLRB to avoid and prohibit stereotypical language in all conference communications. This policy has three goals:

- To give equal respect.
- To eliminate stereotypes from claims roles.
- To encourage non-sexist and non-racist attitudes and behaviors.

Using sexist, racist, or other inappropriate remarks or off-color humor is not permitted at PLRB presentations. Remember: Humor is fine; jokes, by contrast, often are not effective presentation tools.

**Understand the post-conference use of your materials.** One of PLRB's goals is to create a comprehensive technical resource library for its insurer and affiliate members through the

annual collection of high-quality materials and resources from various educational events. Session materials are available to all authorized PLRB members through our website, [www.plrb.org](http://www.plrb.org). Presenters will receive full attribution for their work. All materials will be posted for at least one full year following the educational program.

## V. Get to the Conference

**Make your own hotel and travel reservations.** Check the online schedule to see when your session is scheduled and plan accordingly.

**Sign the Presenter Agreement.** All presenters need to review and comply with the PLRB Presenter Agreement. Please sign/initial pages 1 and 2, then scan and email the agreement to [conference@plrb.org](mailto:conference@plrb.org). This ensures that we continue to provide an outstanding learning experience for the PLRB membership as well as for the claims community in general.

If someone, other than a presenter, wrote or co-wrote the conference materials, they should sign page three as a co-author. Please include that portion of the agreement to PLRB as well.

**Advise PLRB of special needs for materials.** If you have a document (such as a "suggested answers sheet") that you would like PLRB staff to post after the Conference, please let PLRB staff know, so that the document is not posted before the Conference.

**Advise PLRB of presentation requirements, e.g. A/V requirements.** Please order any A/V equipment you need to PLRB by the due date given. If you are working with co-presenters, choose one presenter to handle this. PLRB provides the following A/V equipment in each meeting room:

- Lavalier (clip-on) microphone. With high-ceiling rooms, most speakers should use microphones.
- LCD Projector and screen.
- Wireless mouse.

Get your tech ready with “[Tech Tips for Presenters.](#)”

Think through the day of the presentation and make sure you have the technological equipment you need. If you need to switch out of PowerPoint to play a video or visit a website, test it out before the presentation.



## VI. Conduct the Session and Obtain Feedback

**Arrive early.** By arriving in the meeting room early, you can head off unexpected problems. Start the session promptly; spending the first five minutes struggling to set up your computer could hurt your presentation's momentum before it begins. Delaying the start to wait for stragglers implies that there was no benefit for those who arrived on time.

**Connect with the audience before the presentation.** The most effective presenters connect with the attendees even before the session begins, roaming the room and greeting attendees as they arrive. Resist the temptation to simply chat with your co-presenters and people you already know. Making a connection, however small, with people you do not know will pay large dividends for the presenters and ultimately the entire audience. You can also learn what people hope to learn from the presentation.

**Present with energy and enthusiasm.** At the presentation, challenge the audience by providing information that is new and use the scenarios to integrate the new information into their existing knowledge base. Make it fresh, exciting, and relevant to your audience. Be enthusiastic! Audiences love presenters who are:

**Anxious? Learn tips for preparing for your presentation by watching [Presentations the PLRB Way](#) or reviewing the handouts.**

- a. Conversational. The presentation should be made in a manner which exhibits that the presenter and attendees are equals who are sharing a dialogue on the subject matter.
- b. Enthusiastic. You are interested in your topic, so show it! Audiences can interpret a stilted demeanor to mean you are only there because you were told to come, or that you are really not comfortable with the subject matter.
- c. Entertaining. Although this is not a forum to try out your standup comedian act, a bit of entertainment goes a long way. Laughter is a great tool to energize and engage the audience. Remember that the best-liked presentations include an element of entertainment. If the audience is entertained, they are paying attention.
- d. Respectful. Each person in the audience is important. Be respectful of the trust that has been shown by the PLRB in selecting you as a presenter.
- e. Energetic. Your demeanor can project energy into the session. Standing behind a podium or (ouch!) sitting behind a table for the full presentation provides no energy to the participants. Likewise, talking in a monotone can put people to sleep.

**Retain credibility and control over the audience.** A good rule of thumb is "if you don't know it, don't say it." Presenters do not have to be all-knowing, and there will likely be at least one person in the audience who knows as much as you do. If you don't know the answer to a question, try to draw on the collective experience of the audience for an answer. Although

audience participation is important, don't allow one voice to monopolize the time on irrelevant topics.

**Collect Attendee Evaluations.** Attendees can evaluate the conference and sessions individually immediately after the conference with paper or online surveys. Encourage attendees to provide meaningful comments about the session. Evaluations are beneficial to the presenters, the program committee, and staff, as a means to gauge future presentations and topics.

**Provide Presenter Evaluations.** We value your feedback as well! Please take a moment to evaluate your session and submit ideas and comments to PLRB staff. We are always interested in presenter feedback following our educational events.

**Attend other presentations as desired.** Presenters may attend other sessions when not presenting their own sessions. Conference registration is complimentary for presenters, and you may attend all conference functions and sessions as you wish. PLRB staff will register presenters for the conference.

**Help us apply for Continuing Education Credit.** We will apply for continuing education credits for adjusters from various states, CPCU, and RPA. If your session is selected for CE credits, session materials and other information may be required to be provided to PLRB prior to posted deadlines, depending on the various state requirements.

**These guidelines were developed by PLRB using the [presentations](#) and [documents](#) provided in our resources. Please contact [PLRB Staff](#) with any questions.**