

# The Merits of Mentoring

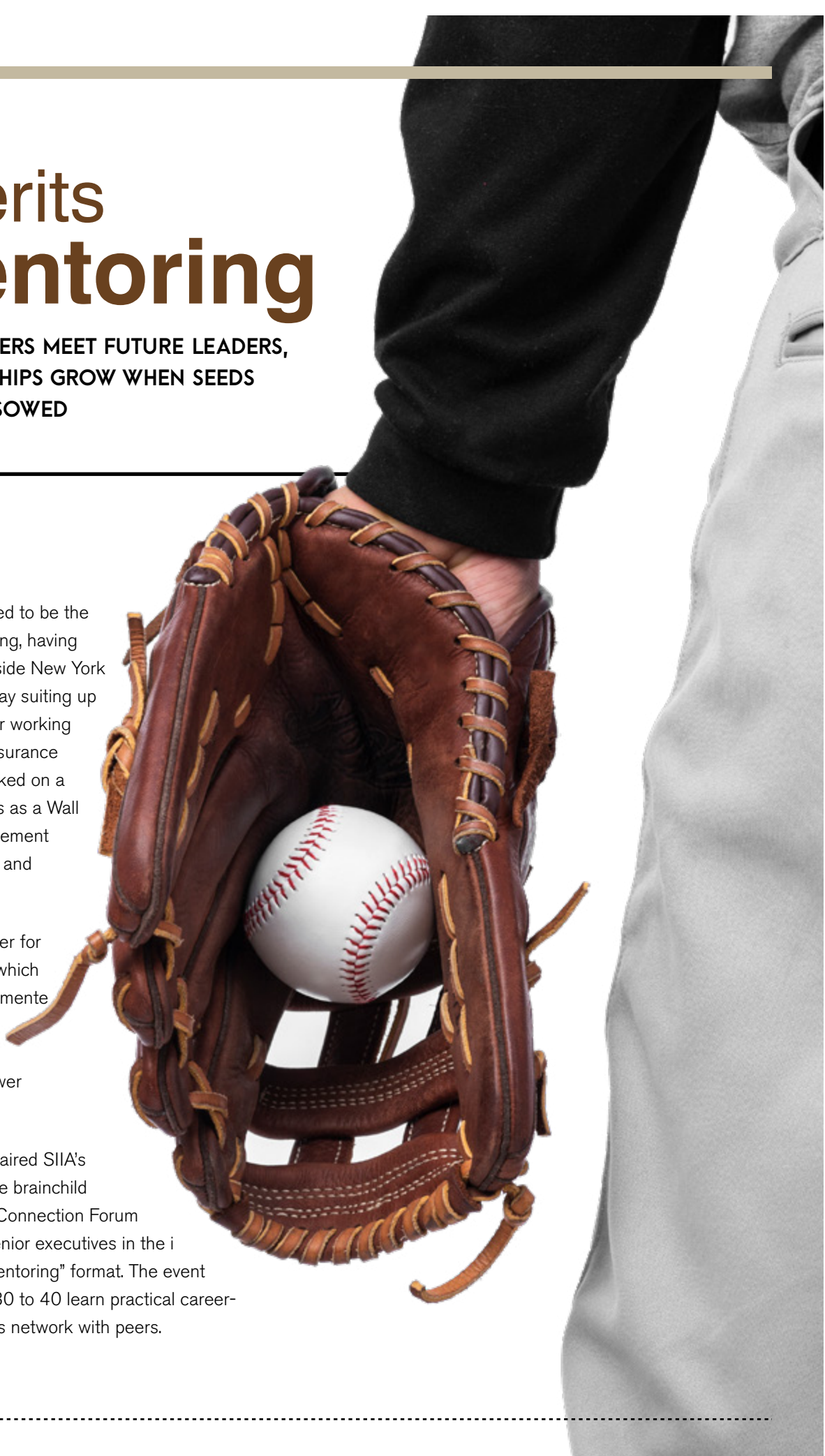
WHEN THOUGHT LEADERS MEET FUTURE LEADERS, SYMBIOTIC RELATIONSHIPS GROW WHEN SEEDS OF KNOWLEDGE ARE SOWED

Written By Bruce Shutan

**C**raig Clemente wanted to be the next Derek Jeter or Eli Manning, having grown up a sports fanatic outside New York City where he imagined one day suiting up as a Yankee or Giant. But after working one summer for his dad's reinsurance company at just 14, he embarked on a meandering career path. Stints as a Wall Street trader and hotel management trainee focused on operations and revenue proved to be detours.

He's now chief operating officer for Specialty Care Management, which former SIIA chairman Bob Clemente founded, and at age 36, he's actively helping shape the self-insurance industry for newer generations.

The younger Clemente has chaired SIIA's Future Leaders Committee, the brainchild behind the upcoming Mentor Connection Forum where they'll be paired with senior executives in the industry as part of a "speed-mentoring" format. The event will help SIIA members ages 30 to 40 learn practical career-advancement advice as well as network with peers.



Another noteworthy name to consider in recognition of this effort is Kari Niblack, CEO of ACS Benefit Services, a third-party administrator whose career path has racked up serious miles. Now in her 50s, she's focused on succession planning to close generational gaps in her firm and has happily taken on the role of mentor.

One such beneficiary of her thought leadership is Lauren Wu, a clinical recruiter at NuWest Group Holdings, LLC who was inspired by a talk she gave at SIIA's national conference about four years ago. Wu, who had just graduated from college at that time, asked if she could buy Niblack a cup of coffee. They have since met at each of those annual events and are engaged in informal chats throughout the year.

"I think it's beneficial for both of us," Niblack says, "and it has been fun to see her move up in her career as a result of having the courage to tap me on the shoulder in the



Kari Niblack

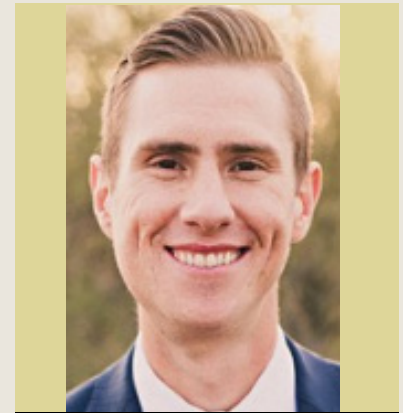
you're not advancing."

### TIES THAT BIND

Mentoring makes perfect sense for Millennials who'd much rather have coaches than bosses and are leery of traditional hierarchies, according to a recent Forbes article that also suggested a meaningful corporate mission and purpose are vitally important to this age group.

It's critical for young people in the industry to verbalize to mentors what they want to derive from that relationship and leverage that resource to the hilt, Clemente believes.

"You can learn from every interaction and piece of information that you get, whether it's during the middle of a workday or over coffee or lunch," he explains, referencing his father-son mentoring experience. "Health care is such a huge and complex



Tony Strazzara

industry, and I think we need to create not only a great organic dialogue, but effective and viable solutions that continue to bring great value to the lives that we are covering in this market," he observes.

Tony Strazzara, age 30, director of actuarial services for Actuarial Strategies & Tactics, Inc., marvels at the way two of his mentors conduct themselves in meetings and on phone calls.

One is Bernie Erickson, the owner of his firm, who shines in seemingly intimidating environments with 20 to 30 people in a client's meeting room where pressure mounts to deliver a killer presentation. "I was just captivated by how natural that was for him, how well versed he was in the industry and in his expertise," he reports. "It inspired me to be like that; just get up there and make that presentation or be on that stage, don't hold back and be confident."

There's also Bill Ashley, CEO of Allied National, a TPA in Kansas City who's a favorite client. Like Erickson, Ashley can easily captivate an audience and is always cool, collected and reflective when answering questions. He's also



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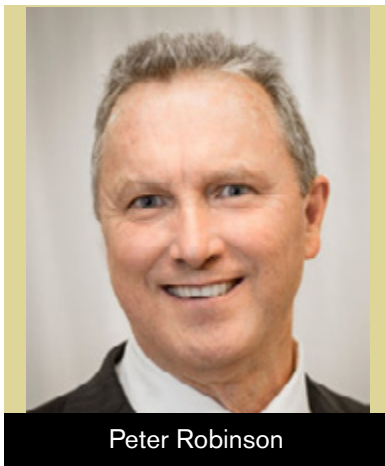


a good listener. "It seems like there's nothing that he doesn't know about the industry," according to Strazzara whose first Future Leaders Committee meeting was last fall in Boston.

### WHAT MAKES A GREAT LEADER

Great leaders are able to balance risk taking with the timing of decisions, according to Niblack. "The higher you go up in an organization, you're not always going to get 100% of the information on any given topic," she says, "so you've got to have the agility to have a particular topic and say, 'okay, tell me pros and cons of this,' and then not stall decision making."

When looking to hire future leaders, she seeks candidates who are adaptable and open to growing in areas that they wouldn't normally be assigned to, as well



Peter Robinson

as their ability to take risks and perform at an exceptional level.

As life expectancy increases and more people tie their identity to work, many of the nation's estimated 73 million Baby Boomers may choose to stay in the workforce or ponder a career crossroad.

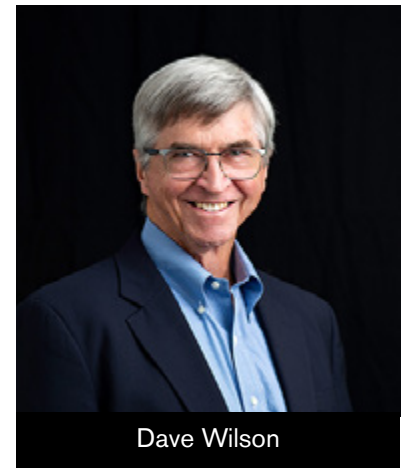
"I don't think retirement's as magical as it used to be for a lot of people," says Peter Robinson, managing director of EPIC Reinsurance, who's in his early 60s and still very much enjoys his work. "I see a lot of people staying on well past traditional markers of retirement age."

That's why it makes sense to build a resilient multigenerational team whose younger employees are visible to clients, he suggests. This shows a clear signal that the company is thinking about its business over a longer term "and not just in the immediate relationship side of the business that's so true around self-insurance," according to Robinson. He feels fortunate to work with people in their 30s and 40s who are looking ahead, "and so we sort of run our business as somewhat of a partnership."

As he edges closer to the twilight of his long and distinguished career, SIIA Chairman Dave Wilson is delighted to learn new things, especially with recent work in the biopharma and genetics space. But the CEO of Windsor Strategy Partners also has been proactive about cultivating new leadership at his company. Paul Fallisi, who's nearly a decade younger, was appointed president last year and will also assume the CEO role in due time. Wilson has helped groom him for more than 30 years.

When bringing in a successor, Wilson warns that it's critically important not to continually undercut that individual, which will only create distress and hasten their exit. "You need to bring in the right person, and you need to let that person run the firm," he adds.

A core value of his is flexibility, which is important at any age. For example, Wilson sought to create an organization where executives could adapt work schedules to their lives rather than the other way around.



Dave Wilson

### SELF-STARTERS AND SELF-LEARNERS

Anyone who is a self-starter and self-learner, as well as motivated by their own aspirations, will have a running head start in terms of advancing their career in the self-insurance industry, Strazzara says. In his case, the doors of opportunity were opened, "but nobody was pushing me through those doors necessarily. I had to walk through them myself."



less of the, 'let me sit down and have coffee with you.' My expectation of our company and client, vendor or broker relationships is that we stay somewhat old fashioned; that we use technology for development of materials and webinars."

Other basic keys to success involve a willingness to bend and nurture client relationships. "We embrace changes every single week, and we don't feel stuck on necessarily one way of doing something," he notes. One of his firm's chief missions is to visit clients face to face. "We could do a lot of our daily work from home or a coffee shop using our own laptops, but we don't," he explains. "We all come to the office every day, and I can see firsthand the benefit that has with the relationships that are fostered here."

When Niblack started out 30 years ago, business deals were consummated with handshakes. "You would actually meet with people," she observes, warning against replacing relationships with impersonal communication. "You would get to know them on a personal level. As technology has advanced, there is much

In spite of these pleas to preserve coveted facetime, younger generations are expected to chip away at the 9-5 mindset with more telecommuting. "I work from home full time," reports Cassie Bachman, Esq., age 31, managing director of compliance for Elevate Risk Solutions. "Working at home is a growing trend, and I think people our age are asking for it while negotiating contracts."



Cassie Bachman

### CONFIDENCE BOOSTERS

In terms of getting promoted and noticed in the self-insurance industry, she believes confidence drives more than 80% of that success. This quality enables her peers to accommodate bigger or different types of work projects or opportunities, she adds.

A second key component is to embrace lifelong learning, which Bachman says is enhanced by setting goals, such as specializing in certain areas or becoming president of a company, and acquiring valuable skills within a certain timetable.

Bachman advises her young peers to look for mentors who have connections and will gladly make introductions that can advance careers. "There aren't a lot of opportunities for people in our industry to find mentors who are not someone they work for," she says, noting that the Mentor Connection Forum is a perfect venue for doing so.



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## The Merits of Mentoring

She hadn't met anyone her age until attending a past SIIA Future Leaders event, which she describes as mind blowing. Bachman lunged at a chance to become part of that initiative and help her generation "make a difference in what we want our future to be in the industry."

Robinson finds it gratifying whenever younger people seek guidance from seasoned leaders in the industry. But since talent is in short supply, he says there's always a danger that some are going to get poached through the mentorship process or they're "drift away" from being over-scheduled or succumbing to distractions.

His parting caveat: "My view with younger people is they have to put their own work into it," he says, "but frequently, they don't know how to create a network or personal board of directors, where to get information or how to expand their relationships to get a broader view of opportunity in their particular part of the experience." ■

Bruce Shutan is a Portland, Oregon-based freelance writer who has closely covered the employee benefits industry for more than 30 years.



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