



Society Newsletter

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www.lomasociety-ohio.org



Letter from the President

Do you ever feel like things at work just get crazier and crazier? More to do? Is it always a struggle to fit it in? I know that is how I feel quite a bit of the time. While this can be overwhelming, I would suggest that is a very good reason to take advantage of a professional membership like the LOMA Society of Ohio.

What a great chance to talk to other professionals in your industry, find out what is happening at other companies and learn about how others are dealing with the problems. Reach out to others! Ask questions! Leverage your network! All of our members (you can find a list on our website!) are here to help you be successful!

I'm looking forward to seeing everyone at our upcoming fall events. They are great opportunities to meet members face-to-face! Also, consider attending LOMA's Annual Conference and Conferment in Boston. You can build your network to include more than just our Society members in the state. Many of our board members will be there representing our Society again this year.

Until next time, have a great rest of the summer!

Leslie Miller, FLMI, AFSI, AIRC, ACS
President, LOMA Society of Ohio

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Cincinnati Spring Luncheon

The LOMA Society of Ohio held its Cincinnati spring luncheon on Monday, April 20th at Western & Southern Financial Group. The event featured a presentation "What is a PMO?"

Society President Leslie Miller opened the meeting and discussed the upcoming Columbus meeting that will take place at Brio on June 3 with the topic about promoting your personal brand. She reminded the group of the upcoming Boston LOMA conferment conference and our current Society membership drive.

Angee Ellis, the Cincinnati Program co-chair, introduced our featured speaker, Sue Range, PMP. Sue is the Assistant Vice President, Project Management Office at Western & Southern Financial Group. She is a certified Project Management Professional with a diverse professional background, having had the opportunity to apply both business and technical knowledge across a variety of industries while developing a flexible, effective, and readily adoptable Project Management Office framework.

Sue opened up her talk discussing project challenges, why projects fail, and can a PMO help. A PMO may not be right for all companies. Considerations regarding a PMO are the culture of the company, having the right people, the size of the teams, and perception of issues that exist.

Many projects fail because they did not plan for failure. They need to be ready and plan for situations they may come across.

PMO benefits include:

- resource management
- project integration
- risk management
- communication
- standards, methodologies, and processes
- managing delivery - which includes schedule, scope, and cost management



Sue emphasized "it's the diligence by which you apply it that makes you successful." You have to figure out how to mobilize the culture, people and teams to bring it forward within your unique organization. There is no cookie-cutter way to implement a PMO, as every organization is different.

Sue shared with the group that for a PMO to be successful in your company, "alignment with senior management is critical." In addition, change is the hardest hurdle to overcome. You have to consider how you will get people from point A to point Z. Socialization is key to that. You have to socialize the PMO. Adjust. Realign. And socialize again.

Cincinnati Spring Luncheon continued

There are three types of PMO's found in organizations: supportive, controlling and directive. The difference is the degree of control and influence that they have. The focus of a PMO is governance, best practices, and portfolio management.

More information on project management and PMO's can be found at www.pmi.org.

Through contributions from the 33 LOMA Society members and guest attendees at the luncheon we raised \$202 as well as three bags of groceries for the Cincinnati Freestore Foodbank.

Raffle winners were Renee Prevatte, Angee Ellis, Julie Haas, Mike Neumeier, and Bob Nothnagel.



Angee Ellis - Cincinnati Program co-chair, Western & Southern; Sue Range – AVP, PMO, Western & Southern;
Renee Prevatte - Cincinnati Program co-chair, Western & Southern



LOMA Society of Ohio President Leslie Miller, Nationwide, opening up the meeting.

Columbus Spring Luncheon

The Society held its Columbus spring luncheon on Wednesday, June 3rd at the Easton Brio with 27 attendees. Professional speaker Tonya Tiggett presented on the topic of "Negotiation." Tonya came to us with a learning and development background that includes over 20 years experience working with public schools, higher education, and JP Morgan Chase.

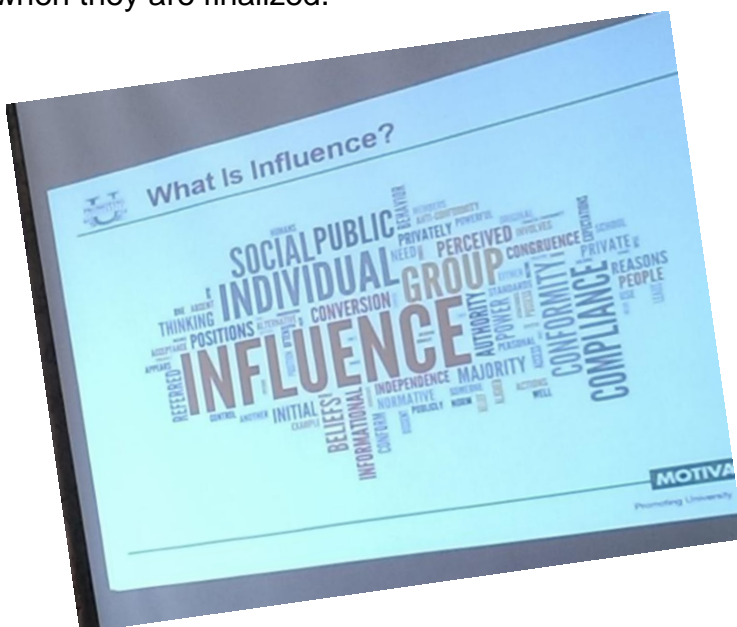


It was during her corporate tenure that Tonya realized the number one obstacle many professionals faced, including her at times, was being able to speak up in business settings and establish one's value at work. This critical skill spurred Tonya to not only overcome that obstacle with great success, but to also create a communication training company called Promoting University, LLC where she shares her communication approach for career advancement with business professionals.

Tonya's presentation focused on a formula for non-legal situations and contexts at work, such as moving your agenda forward for either the business or your personal gain. Tonya proposed many questions to consider prior to negotiating such as:

- What is it you want?
- Why will the other person/party/customer say no?
- How can you overcome the no?
- How are they influenced to say yes?
- What's your Plan B, C?

The Columbus fall luncheon will be held at the Mid Ohio Foodbank and a date/further details will be released when they are finalized.



Tonya Tiggett, Promoting University, LLC

Scholarships

Due July 10th!!

It is time once again for members of The LOMA Society of Ohio to take advantage of the annual scholarship opportunities! The Society will award two candidates a scholarship in the amount of \$750.00 each.



Eligibility requirements include the following:

- The candidate must be a high school graduate, accepted by a university, or already a college student.
- The candidate must be, or have a parent who is, an active LOMA Society member in good standing.
- The candidate must have maintained a good scholastic record throughout high school or college study.
- The candidate must be pursuing either 1) a baccalaureate degree full-time, or part-time if employed or 2) a Master's degree

Please note that Board Members or children of board members are not eligible for these scholarships.

Application information was sent to our current membership. The application must be completed and received by end of day Friday, July 10, 2015. Any applications received after this date will not be eligible for consideration. Applicants must include a certified copy of college transcripts, or a record of standard achievement examinations (American College Testing Program, or Scholastic Aptitude Test) taken by the applicant. Incomplete applications will not be considered. All eligible applications will be reviewed by the LOMA Education sub-committee and will be evaluated on the basis of scholastic achievement, school activities, awards or honors, and extracurricular activities. Finalists will be referred to the LOMA Society Board for final selection. Announcement of scholarship recipients will be sent via US mail by Friday August 7, 2015.

Scholarship recipients will be presented to the LOMA Society of Ohio membership at the annual fall meeting as well as in the newsletter following the decision.

Click [here](#) for the LOMA Scholarship Application.

Please feel free to forward any questions to the Loma Society Education Chairpersons:

Jennifer Cline, Cincinnati Education Chair
Leslie Miller, President

jcline@ipipeline.com
MILLEL55@nationwide.com

Meet our new Columbus Program co-chair



COLUMBUS PROGRAM CO-CHAIR - Nick Moulakis, Nationwide
Nick Moulakis holds the FLMI and ACS designations and a bachelor's degree from Denison University in Granville, Ohio. Previously he was Program Director for Teton Valley Ranch Camp, a western boarding camp near Jackson Hole, Wyoming and joined Nationwide in late 2008 as a Case Manager in the Life Underwriting Department. Nick is currently a Senior Analyst on the Performance Measurement & Analytics team and provides data-centered solutions and consulting to operations leaders.

Educate. Engage. Inspire.

Interested in a Leadership Opportunity?

We are looking for a new Columbus Education co-chair to assist with the review, selection and administration of the LOMA Society Scholarship program. If you are interested, please contact Leslie Miller.





Interested in Membership? Know others interested?

The purpose of LOMA societies is to provide society members, students, insurance professional and financial services professionals with opportunities for continuing industry education, professional growth, networking opportunities, and to increase the recognition of all LOMA designations.

Key points about being a member of the LOMA Society of Ohio:

- ***Listen to some of Ohio's subject matter experts on industry topics affecting your company.*** The Society holds four business luncheons (two in Columbus and two in Cincinnati) each year.
- ***Ever wonder if another company encounters the same issues as your company?*** Connect with industry leaders and insurance and financial services professionals throughout the state of Ohio.
- ***Learn what is going on in the insurance industry in Ohio.*** Receive Society newsletters to keep you informed regarding Society events.
- ***Social Responsibility:*** The Society has been awarded LOMA's Community Service Award numerous times over the years. Our Society continues to support charities. The Society offers two educational scholarships each year, available to members or a family member, subject to the rules of the education scholarship program.
- ***Leadership Opportunities:*** The Society has been awarded LOMA's Communication and Public Relations Award multiple times, as well. Help continue this tradition and broaden your leadership skills as a board or committee member.

Did you know we have over 80 members representing the following companies?

Ameritas Life
Columbus Life
Farmer's New World Life

Lafayette Life
Nationwide
Ohio National Financial Services

State Farm
Western & Southern Life
iPipeline

2015 Charities

Our 2015 charities are:

Mid Ohio Foodbank in Columbus <http://www.midohiofoodbank.org/>

Freestore Foodbank in Cincinnati <http://www.fsfbmedia.org>

Leukemia & Lymphoma Society <http://www.lls.org/>

If you have questions, please reach out to Leslie Miller.



Calendar of Upcoming Society Dates:

July 10 Scholarship applications due



Upcoming LIMRA/LOMA Conferences:

<p><u>Social Media Conference for Financial Services</u> August 19-21, 2015 Hyatt Regency San Francisco San Francisco, California</p>	<p><u>2015 LOMA Annual Conference & Conferment</u> September 9-11, 2015 Sheraton Boston Hotel Boston, Massachusetts</p>
<p><u>Critical Illness Insurance Forum</u> September 28-30, 2015 Walt Disney World Swan Orlando, Florida</p>	<p><u>Customer Service Conference</u> March 2-4, 2016 Hyatt Regency Austin Austin, Texas</p>

Board Contact Information

President - Leslie Miller	millel55@nationwide.com
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Secretary - Nicole Frazier	nfrazier@ameritas.com
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Education Chair (Cincinnati) - Jennifer Cline	jcline@pipeline.com
Education Chair (Columbus) - open	
Columbus Program Co-Chair - Josh Estep	estepj1@nationwide.com
Columbus Program Co-Chair - Nick Moulakis	moulakn@nationwide.com
Cincinnati Program Co-Chair - Angee Ellis	angee.ellis@wslife.com
Cincinnati Program Co-Chair - Renee Prevatte	renee.prevatte@wslife.com
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