

Strategic Plan: Education & Professional Development

Overall Goal: Create a successful and easy to utilize professional development program

Year 1: 2026

Focus: Professional Development

1. Secure new and additional instructors

Action Steps	Success Measures	Notes

2. Secure CE for professional development

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Professional Development

3. Offer a range of courses for CE including in-person, digital & soft skills

Action Steps	Success Measures	Notes

4. Focus on a sales course, NExtgen, Leadership Academy creation & marketing IA-MBA

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Professional Development

5. Human Resources & Leadership Program fully developed and implemented

Action Steps	Success Measures	Notes

6. Fully developed and executed professional development program

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Education & Professional Development

Overall Goal: Expand and promote insurance designations & designation programs

Year 1: 2026

Focus: Growth and expansion of designation programs

1. Assess continued participation with the Alliance

Action Steps	Success Measures	Notes

2. Research and vet other credentialing service providers and new designations

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Growth and expansion of designation programs

3. Implement new designation offerings

Action Steps	Success Measures	Notes

4. Determine if CISR/CIC is still a viable option

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Growth and expansion of designation programs

5. Have CISR/CIC or a new designation program in place and generating revenue

Action Steps	Success Measures	Notes

6. Four new designations being offered as well as micro-credentialing (via ABEN)

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Education & Professional Development

Overall Goal: Create and implement a mentorship program

Year 1: 2026

Focus: Mentorship

7. Explore in-person panel and/or discussion sessions

Action Steps	Success Measures	Notes

8. Group site or community tab created

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Mentorship

9. Ability to sign up as a mentor or mentee created for members

Action Steps	Success Measures	Notes

10. Having panel/discussion rooms at Annual Convention

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Mentorship

11. Robust community group running

Action Steps	Success Measures	Notes

12. Fully functional and operating mentorship program in place

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Education & Professional Development

Overall Goal: Expand education services to other states

Year 1: 2026

Focus: Education expansion

13. Create a package of educational offerings/services that can be marketed to other states

Action Steps	Success Measures	Notes

14. Research and reach out to states nearest to Nebraska re: education programming

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Education expansion

15. Sign up for at least two new states for our education services

Action Steps	Success Measures	Notes

16. Create marketing pieces to promote Nebraska as an educational resource for Big I and PIA

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Education expansion

17. Successful implementation of providing education services to other states

Action Steps	Success Measures	Notes

18. Education offerings are a strong revenue source

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Education & Professional Development

Overall Goal: Ensure sustainability and success for pre-licensing classes

Year 1: 2026

Focus: Pre-licensing

19. Expand marketing of pre-licensing classes

Action Steps	Success Measures	Notes

20. Explore hybrid/online options

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Pre-licensing

21. Implement hybrid/online options

Action Steps	Success Measures	Notes

22. Recruit new instructors including life/health, explore Hiring our Heroes partnership

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Pre-licensing

23. Sustainability/succession plan in place for Dave's retirement

Action Steps	Success Measures	Notes

24. Fully functional digital options available for members to utilize

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Member Services

Overall Goal: Improve market access

Year 1: 2026

Focus: Market Access

25. Explore and implement partnership with Colorado for market access

Action Steps	Success Measures	Notes

26. Continue to market and educate members about Blue and Gold Alliance products

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Market Access

27. Increase marketing of market access programs to members

Action Steps	Success Measures	Notes

28. Move into FAIR plan next steps (if needed)

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Market Access

29. Fully functioning market access programs that are a revenue source

Action Steps	Success Measures	Notes

30. Cohesive marketing strategy for market access programs

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Insurance Products

Overall Goal: Grow revenue streams from additional products and services

Year 1: 2026

Focus: Additional products/services offerings

31. Explore Swiss Re products and services, what else can we offer and monetize

Action Steps	Success Measures	Notes

32. Assess what services we can package and offer to other states, such as event management

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Additional products/services offerings

33. Engage with members regarding new products and begin actively marketing them

Action Steps	Success Measures	Notes

34. Pitch nearby states the additional services we offer

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Additional products/services offerings

35. Create a designated revenue stream from additional products

Action Steps	Success Measures	Notes

36. Become the provider to at least two additional states for services

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Membership Services

Overall Goal: Provide high quality, innovative and necessary services for members

Year 1: 2026

Focus: Conventions

37. Invite other associations to attend our events that could be beneficial

Action Steps	Success Measures	Notes

38. Build in more networking time at events, include fun games and activities to increase interaction, and create positive memories for members

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Convention

39. Expand event committees and create succession planning in committees to provide stability and knowledge

Action Steps	Success Measures	Notes

40. Increase targeted marketing for all events and solicit higher end speakers to events

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Conventions

41. Create collaborative regional conferences and assess the potential for niche/specialty conferences

Action Steps	Success Measures	Notes

42. Increased attendance and engagement at events

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Communications & Marketing

Overall Goal: Create high quality communications pieces and marketing materials that drive engagement

Year 1: 2026

Focus: Communications

43. Completion of upgraded website with greater ease of use

Action Steps	Success Measures	Notes

44. Use of HubSpot for segmented communications (which will include data clean-up)

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Communications

45. Full use of HubSpot for communications and events

Action Steps	Success Measures	Notes

46. Utilize social media, especially the use of photos to communicate with members

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Communications

47. Increased open rates and ensuring deliverability to the correct person

Action Steps	Success Measures	Notes

48. Addition of staff member to manage social media and assist with data collection

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Communications & Marketing

Overall Goal: Create high quality communications pieces and marketing materials that drive engagement

Year 1: 2026

Focus: Marketing

49. Market IIABA offerings such as 401(k), life/health insurance to members

Action Steps	Success Measures	Notes

50. Begin marketing to captives for pre-licensing

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Marketing

51. Assess digital presence and determine if changes need to be made, begin work on full-scale marketing plan

Action Steps	Success Measures	Notes

52. Create new campaign with Learfield that is longer term as part of marketing plan

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Marketing

53. Market events and education offerings to other associations and captives

Action Steps	Success Measures	Notes

54. Finalize and launch a full-scale marketing plan

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Advocacy

Overall Goal: Grow, refine, and market advocacy

Year 1: 2026

Focus: Committees

55. Reassess current LAC status, membership and determine participation

Action Steps	Success Measures	Notes

56. Utilize legislative committee more consistently for bill overview and outreach

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Committees

57. If LAC is to be re-engaged, have it fully set and in motion

Action Steps	Success Measures	Notes

58. Solidify legislative committee (what is their role if we move away from LAC) in place with a leadership structure

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Committees

59. Have full committees in place with a schedule for leadership progression moving forward

Action Steps	Success Measures	Notes

60. Work with committees to create additional event opportunities for members to engage with legislators

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Advocacy

Overall Goal: Grow, refine, and market advocacy

Year 1: 2026

Focus: Lobbying

61. Proactive conversations about forward momentum with lobby team

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Lobbying

62. Assess if a re-bid of services is necessary and determine scope of future work/structure

Action Steps	Success Measures	Notes

63. Work with committees to create a legislative business plan that is proactive

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Lobbying

64. Carryout lobbying bidding (if necessary) determine structure moving forward

Action Steps	Success Measures	Notes

65. Have fully functioning legislative business plan in place

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Advocacy

Overall Goal: Grow, refine, and market advocacy

Year 1: 2026

Focus: Communications

66. Ensure website is interactive and easy to navigate, create the ROI document with a focus on advocacy

Action Steps	Success Measures	Notes

67. Create the Robert Hoppee Legislative Scholarship Fund (in partnership with IIAN Foundation) to take a NExtgen leader to the Legislative Conference in Washington D.C. annually

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Communications

68. Ensure we are promoting legislative wins on state and federal levels, share more actively about advocacy efforts, plan to engage more members on social media re: advocacy

Action Steps	Success Measures	Notes

69. Launch the Hoppe Scholarship

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Communications

70. Consistent communication and engagement with members regarding advocacy

Action Steps	Success Measures	Notes

71. Hoppe Scholarship fund running and first recipient creates promo video

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Advocacy

Overall Goal: Grow, refine, and market advocacy

Year 1: 2026

Focus: PACs

72. Ensure Board participation in the PACs is at 100%

Action Steps	Success Measures	Notes

73. Kick-Off Campaign to solicit donors, solicit and secure more PAC committee members, highlight major donors

Action Steps	Success Measures	Notes

74. Utilize visual representation of PAC goals (thermometer, etc.), utilize additional techniques like agency contests

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: PACs

75. Continue annual PAC campaign, continue “competitive” marketing of donors, solicit donors to sit on committee

Action Steps	Success Measures	Notes

76. Identify and create plans to increase participation and funding of IIANPAC

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: PACs

77. Committee growth with a rotating leadership structure in place

Action Steps	Success Measures	Notes

78. Increase InsurPAC donations by 10-15%

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____

Strategic Plan: Strong governance

Overall Goal: Continue to build on strong leadership and Board oversight

Year 1: 2026

Focus: Governance

79. Provide strategic plan to Board members, assign each member a pillar for oversight and input

Action Steps	Success Measures	Notes

80. Highlight Board members and actively recruit more volunteers

Action Steps	Success Measures	Notes

Year 2: 2027

Focus: Governance

81. Ensure all Board members are getting onboarded and have a part in the strategic plan

Action Steps	Success Measures	Notes

82. Update Board policies and procedures to align with strategic plan where necessary

Action Steps	Success Measures	Notes

Year 3: 2028

Focus: Governance

83. Strong pipeline of Board members to move into leadership roles in place

Action Steps	Success Measures	Notes

84. Spend more time with Board members when creating the next strategic plan for greater input

Action Steps	Success Measures	Notes

Progress Review

Mid-Year Check-In Notes: _____

End-of-Year Reflections: _____

Adjustments for Next Year: _____