

ERIE INSURANCE: CULTIVATING INTENTIONAL LEADERS FOR LASTING IMPACT

At Erie Insurance (ERIE), leadership development isn't just a priority. It's the cornerstone of the company's growth and commitment to exceptional customer service. ERIE has long understood that intentional, effective leadership is vital for navigating complexity, fostering innovation, and fulfilling its promises to customers and independent agents.



In 2024, ERIE made a profound investment in cultivating leaders at every level of the organization. This critical initiative was guided by Kevin Ray, vice president of Learning & Development, and Kathy Felong, vice president of Communications, Culture & Change Management. The collaborative team they assembled took the work from imagination to design to implementation. But it started with understanding the needs of ERIE's leaders and the expectations of its executives, gathered through listening sessions, interviews and enterprise survey results.

"Leadership at ERIE is intentional," says Kevin Ray. "It's about self-awareness, authenticity, and the ability to inspire others to deliver on our promise to customers and independent agents." This belief reflects ERIE's view of leadership development as a decisive strategic advantage that drives employee engagement, strengthens teams, and positions the company for enduring success.

The Intentional Leader Program: Transforming Leadership for the Future

The result was the Intentional Leader experience. It's a bold and transformative initiative to reenergize and reconnect its leadership community. The program seamlessly aligned with ERIE's core values and mission, designed to empower leaders with the mindset, skills, and tools essential for thriving in an ever-evolving environment.

The timing couldn't have been more critical. Eight years had passed since ERIE's last major leadership development initiative, and the turnover and growth that followed the COVID-19 pandemic underscored the need for alignment and renewed purpose among leaders. With the full support of President and CEO Tim NeCastro, the Intentional Leader was launched as a much-needed "leadership reset and recharge."

The program was ambitious in both scope and execution. Over three weeks in November 2024, nearly **1,000 leaders across three cohorts participated in more than 150 sessions** in Erie, Pennsylvania. The curriculum centered on three key themes:

Purpose-Driven Leadership: Encouraging leaders to reflect on their values, strengths, and well-being, fostering authenticity and inspiring their teams.



Kevin Ray
Vice president of Learning
& Development

Critical Future-Ready Skills: Building decision-making, emotional intelligence, and adaptability to tackle complex, modern challenges.

Relationship Strength: Reinforcing ERIE's longstanding strength as a company bolstered by relationships and a commitment to "the human touch."

"We knew we needed to create a 'wow' experience," says co-sponsor Kathy Felong, "one that reminded leaders who we are at ERIE, and inspired confidence in themselves and in the support of like-minded colleagues."

The Intentional Leader marked a pivotal moment for ERIE, equipping its leadership community with the tools and vision needed to navigate whatever's ahead.

IMS: A Valuable Partner in Leadership Growth and Development

To bring the Intentional Leader Program to life, ERIE collaborated with **The Institute for Management Studies (IMS)**, renowned for delivering exceptional learning experiences. IMS played an essential role in the program's success, working closely with ERIE to align with its objectives, timeline, and unique challenges.

Leading the charge were IMS representatives Jon Peters, Mark and Michele Jesty, Stacey Schroeder, and Cindy Smith, who curated top-tier educators to deliver sessions on strategy, communication, and leadership excellence. With a tight schedule and the unpredictable November weather in Erie, IMS strategically prioritized faculty from the Northwest region to minimize potential travel disruptions.

Kevin Ray highlighted the significance of this partnership: "IMS has been an invaluable ally in delivering transformational learning experiences. Their programs provide our leaders with innovative ideas, thought leadership, and practical tools they can implement immediately. Thanks to IMS's flexibility and expertise, we went beyond traditional training and created a program that truly resonated with our leaders."

The Intentional Leader Program delivered tangible results for ERIE. Leaders emerged from the program with a renewed sense of purpose, a deeper understanding of their roles, and actionable skills to drive impact across the organization.

A Commitment to Leadership and Service

ERIE is proving its commitment to employees, independent agents, and customers with this clear focus on leadership development. Partnering with IMS, ERIE delivered a strong and inspiring platform through the Intentional Leader program—an initiative that is already driving success and which provides direction and motivation for future leadership development. By investing in growth, innovation, and exceptional service, ERIE is building a brighter, stronger future for everyone they serve.

About Erie Insurance

According to A.M. Best Company, Erie Insurance Group, based in Erie, Pennsylvania, is the 12th largest homeowners insurer, 13th largest automobile insurer and 13th largest commercial lines insurer in the United States based on direct premiums written. Founded in 1925, Erie Insurance is a Fortune 500 company and the 17th largest property/casualty insurer in the United States based on total lines net premium written. Rated A+ (Superior) by A.M. Best, ERIE has nearly 7 million policies in force and operates in 12 states and the District of Columbia.

