

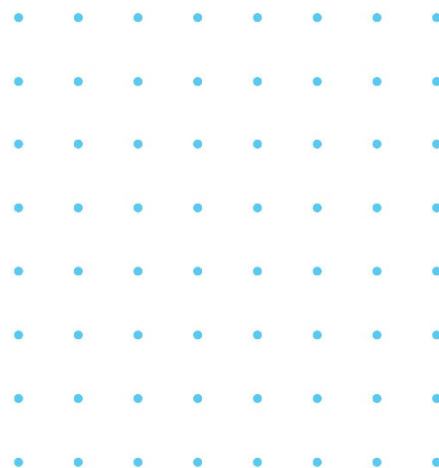
# SHAPING OUR FUTURE



## NIPR Strategic Plan 2024-2026

*Approved January 17, 2024*

*NIPR Board of Directors*





*“Mission is our engine.”*

*NIPR board member*

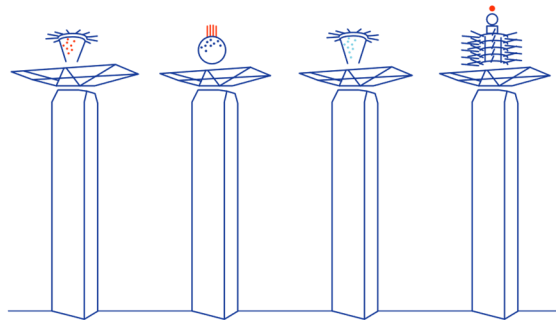
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NIPR is a virtual organization, but our roots are in Kansas City, Missouri.

To pay homage to those roots, the visual image for this plan is straight from the KC skyline. **Bartle Hall** features four pylons that rise above the Convention Center. They support the steel cables that suspend the building over Interstate 670, allowing traffic to pass under. On the top of each pylon is a “sky station” sculpture, a public art exhibition by R.M. Fischer made of aluminum and steel. The pylons, symbols of architectural creativity and functionality – art and science – reflect our approach to building great teams and serving our customers.

As NIPR looks forward to shaping our future, we are inspired by the Bartle Hall pylons and sky stations.



# SHAPING OUR FUTURE

## Strategic Plan 2024–2026

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The NIPR Strategic Plan 2024–2026 identifies four areas that NIPR has carefully cultivated to support its exceptional work and provide a solid structure for the future. The pillars of people and culture, customer experience, technology, and product drive our strategic plan within their own areas of excellence and function together with a unified vision for propelling NIPR’s mission into the future.

**Our three-year plan is fueled by the inspiration to look upward, to seek new ways to support our customers with greater efficiency, enhanced value, and additional resources – always with a personal touch. NIPR’s journey has brought us to a place of strength and stability. We are confidently embedded in service to the insurance industry as we continue our quest for next-level excellence and innovation.**

## Letter from NIPR CEO

Success is a project that is always under construction.

– Pat Summitt, Tennessee Lady Vols basketball coach, 1974–2012



*CEO Karen Stakem Hornig and the NIPR team celebrate a successful year at the 2023 holiday party.*

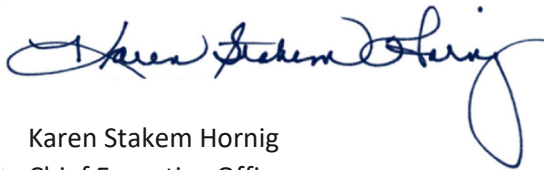
Over the last three years, NIPR has experienced growth and successes that have led us to new levels of achievement. Our last plan, Bridge to the Future, NIPR Strategic Plan 2021–2023, strengthened our agility, systems, and responsiveness. Guided by our vision, values, and mission, we’ve brought an entrepreneurial spirit to our work, challenging ourselves to consistently enhance our offerings and service.

Today, we are adding new team members and strengthening our teams. We are advancing our technology and building an exceptional

customer experience. To adapt to the changing needs of the insurance industry, we are developing new products that solve problems and provide critical support to both insurance producers and state regulators. NIPR has distinguished itself as not simply a responsive organization, but one with the expertise to be trusted to serve the industry.

As we launch our new strategic plan, **Shaping Our Future, Strategic Plan 2024–2026**, we do so on a strong foundation coupled with momentum and potential never before felt in our organization. Our hard-working team and strong, trust-based relationships within the industry and with regulators have set our ability to do exceptional work and deepened our commitment to innovation and excellence.

I am pleased to present the 2024–2026 strategic plan produced through the leadership and guidance of NIPR’s Board of Directors in partnership with the entire NIPR team. From a place of strength, we will continue to deliver on our mission and innovate for the future.



Karen Stakem Hornig  
Chief Executive Officer

NIPR's powerful values ensure that **teamwork, excellence, trust, and innovation** drive all organizational decisions and activities.

### MISSION

NIPR is a not-for-profit technology company that provides cost-effective, streamlined, and uniform licensing data and compliance services for insurance professionals. Together with the NAIC and the insurance industry, NIPR protects and serves insurance consumers.

### VISION

NIPR is a licensing and compliance resource for insurance professionals, providing expertise, agile technical solutions, innovative tools, and data to support the changing needs of state regulators and the insurance industry.

### VALUES

NIPR's values define our distinctive organizational culture and powerful commitment to an unsurpassed customer experience. These values contribute to an excellent work environment for the NIPR team and, most importantly, to the highest levels of trust and satisfaction for those we serve.



#### TEAMWORK

NIPR values collaboration, partnerships, and teamwork within a diverse, equitable, and inclusive organization.



#### EXCELLENCE

NIPR values excellent technical solutions and internal processes that are efficient, accessible, timely, and cost-effective.



#### TRUST

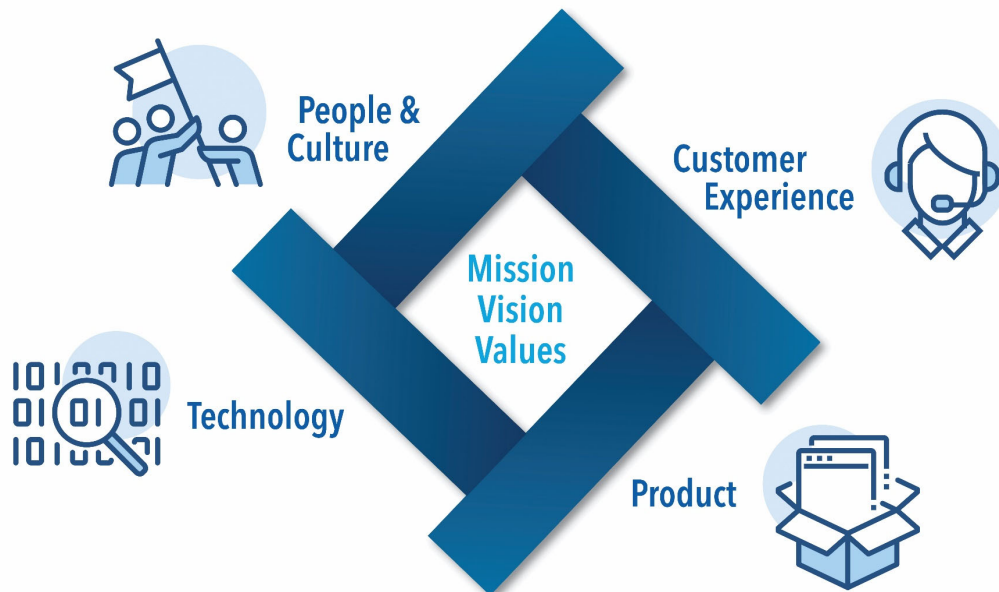
NIPR values its relationship with customers above all and strives to continuously provide stable, reliable, and consistent resources and a secure and user-friendly customer experience.



#### INNOVATION

NIPR values the ability to address relevant and emerging issues and provide exceptional resources, service, education, and guidance to our customers.

**NIPR has reached a pinnacle following years of significant growth** — cultivating team members, advancing technology, building an exceptional customer experience, and developing products that solve problems and support insurance producers. Now it is time to hone the lessons learned and capitalize on NIPR’s leadership. **We will shape the future in the way we adapt our working environment to harness the skills of the best and the brightest, anticipate needs and challenges of our customers, and expertly develop innovative technology and products to advance NIPR’s mission.**





## Strategic Pillar 1

### People & Culture



> NIPR Values: Teamwork, Excellence, Trust, Innovation

NIPR’s enduring focus on people and culture has built organizational strength and agility. We are committed to creating and cultivating potential in individuals, developing high-performing teams, and producing strong, business-savvy leaders who support our mission and advance the field.

#### Goal 1: Organizational Culture and Strength

Optimize NIPR’s strong, people-centered culture by integrating NIPR’s diversity, equity, and inclusion program with organizational development initiatives to advance mission, promote excellence, and ensure the highest level of customer and employee value.

##### Goal 1 Objectives

1. **Enhance NIPR’s diverse and virtual work environment** by training on and embedding inclusive workplace best practices for higher efficiency, accountability, and results.
2. **Scale NIPR’s business model** by leveraging programs and initiatives such as organizational gap assessments, business continuity planning, culture mapping, and policy development for increased organizational success.

#### Goal 2: Team Excellence

Maximize team and leader performance across the organization through an intentional focus on best-practice training and professional development to elevate team function.

##### Goal 2 Objectives

1. Leverage high-standard assessment tools to **identify team dynamics and develop performance plans** to build team strength and identify areas for ongoing development.
2. **Strengthen NIPR’s leaders** through customized professional leadership and skills development to advance team performance and ensure continuous excellence in operations and leadership quality.

### Goal 3: Employee Success and Satisfaction

Conceptualize and build a standardized and rewarding framework for all NIPR team members to drive individual growth and support organizational success.

Goal 3 Objectives
<ol style="list-style-type: none"><li>1. <b>Build and embed a coaching culture</b> within NIPR to provide regular developmental feedback at multiple touchpoints throughout the year for optimal levels of team member engagement from orientation onwards.</li><li>2. <b>Harmonize job structure, compensation, performance, development, and career growth</b> to provide better clarity and visibility into the work experience at NIPR.</li></ol>



## Strategic Pillar 2

### Customer Experience



> NIPR Values: Teamwork, Excellence, Trust, Innovation

We will build and sustain enduring state and industry relationships by treating every customer as a valued colleague. To us, that means personalizing interactions, serving as trusted partners, and reducing steps to streamline work for increased ease and efficiency.

#### Goal 1: Outreach and Communication

Leverage NIPR's resources and expertise to strengthen the industry and state regulator relationships.

##### Goal 1 Objectives

1. **Enhance and develop education and training plans** for regulators and members of industry to enhance understanding of states' compliance requirements and of the credentialing processes available through NIPR.
2. **Launch a comprehensive strategic communications plan** to promote key products and services, deepening awareness of all NIPR resources and services.
3. Ensure perspective gained through **customer feedback** is incorporated appropriately into all outreach and communication.

#### Goal 2: Business Development

Build on NIPR's areas of strength to **develop the vision, strategy, and planning** for next-level customer value and support.

##### Goal 2 Objectives

1. Develop and implement a **comprehensive state account management** strategy to ensure excellent relationship management, enhanced value, and the ability to anticipate future needs and services.
2. **Execute an innovative business development strategy** that delivers value to new and existing customers and maximizes usage of products and tools in service to NIPR's mission.

### Goal 3: Resources & Tools

Elevate the customer experience, deepen engagement, and improve satisfaction through enhanced NIPR resources and tools.

#### Goal 3 Objectives

1. **Implement self-service capacity** so customers can streamline their NIPR experience with customized accounts and reports, access content-specific knowledge-based articles, and track issues using external features of the relationship management system.
2. Create and implement a **best-in-class billing system and procedures** to improve efficiency, reduce manual processes, and maximize integration with external tools.
3. Leverage **state-of-the-art tools** to capture customer feedback, enhance NIPR's service, improve efficiency, and personalize the customer journey by forecasting usage and analyzing data.



## Strategic Pillar 3

### Technology



> NIPR Values: Teamwork, Trust, Excellence, Innovation

Technology supports NIPR’s mission and advances strategic goals by ensuring we enact best practices and continually improve our products. Adopting new and emerging technologies enables us to better manage costs, achieve optimal uptime for our applications, and provide easy access to data that will create value for our customers. We are committed to providing a trustworthy and forward-looking technology platform to support all those we serve.

#### Goal 1: Generate Business Insights.

Foster a **data-driven culture** by maturing the Enterprise Data Warehouse through data aggregation and analysis that creates new insights and value easily accessible for team members, regulators, and customers.

##### Goal 1 Objectives

1. **Integrate transactional and customer data into the Enterprise Data Warehouse** to complement producer and state data.
2. **Develop new dashboard capabilities** leveraging the additional data.
3. Prioritize added value to all users by building a **roadmap of additional capabilities** for the Enterprise Data Warehouse based upon customer needs.

#### Goal 2: Deliver Software Platform and Process Improvements.

Develop **new platform capabilities and process improvements** for technical and business teams to make them more effective and/or efficient.

##### Goal 2 Objectives

1. Complete launch and migration to **new NIPR Identity Management System**, including new web service authentication solution.
2. Develop vision, strategy, and roadmaps for both **business platforms and technical platforms**.
3. Prioritize added value to all users by building a **roadmap of additional capabilities** for NIPR’s platform tools and business processes, based upon customer needs.

### Goal 3: Improve the Health and Reliability of NIPR's Products and Services.

Foster an organization-wide mindset centered on the **operational health and reliability of products** to exceed current and anticipate future customer needs and expectations.

Goal 3 Objectives
<ol style="list-style-type: none"><li>1. Develop and implement an <b>organizational framework to monitor and continuously improve</b> the reliability and performance of NIPR products.</li><li>2. Develop and share <b>organizational goals based upon the framework</b> to ensure all team members embrace the importance of continuous improvement.</li></ol>



## Strategic Pillar 4 Product



> NIPR Values: Teamwork, Excellence, Trust, Innovation

NIPR is committed to leveraging user-centric design principles, using customer feedback to continually improve, and remaining adaptable to industry trends to create products that consistently exceed customer expectations. We will drive customer satisfaction and loyalty by prioritizing simplicity, efficiency, cost-savings, and access to the most current regulatory data to create a seamless and pleasant experience for all our customers.

### Goal 1: Become the Leading Resource in Individual Producer and Adjuster Licensing Management.

Provide **simple, easy-to-follow designs, tools, and features** to support a personalized, individual experience for all customer interactions, ensuring we eliminate unnecessary steps, promote efficiency, and continue to provide extraordinary value.

#### Goal 1 Objectives

1. Provide a **consistent, clean, and easy-to-use** interface across all NIPR web sites.
2. Develop a personalized experience through **user accounts**.
3. **Integrate producer data** so users can see the whole insurance compliance process in one place.
4. **Streamline services** to allow users to complete actions in as few steps as possible.

### Goal 2: Strengthen Regulatory Data Supply Chain.

Grow our position as the **trusted national resource** for acquiring and maintaining state regulatory data.

#### Goal 2 Objectives

1. Expand data-related partnerships and data integration capabilities to ensure customers have **access to relevant and actionable information**.
2. Increase the **delivery speed** of current and accurate state data to all customers.
3. Integrate products with **real-time regulatory data**.

### Goal 3: Drive Cost Savings and Efficiency.

Support NIPR’s mission to provide cost-effective and streamlined services through the strategic use of **intelligent automation** for carriers, agencies, brokerages, and NIPR’s resellers.

#### Goal 3 Objectives

1. Make it easier for carriers, agencies, brokerages, and NIPR’s resellers to **integrate with NIPR’s software** to solve their business needs through an improved Application Programming Interface (API).
2. Give customers **on-demand, event-driven data in real time** to assist in ensuring compliance for their entire producer population.
3. Ensure NIPR’s products are **easier to test and implement** by creating a robust testing suite and testing environment to support successful customer releases.
4. Enhance the **reseller and insurance customer experience** with expanded access to NIPR’s credentialing tools, including Attachment Warehouse capabilities.

## Final Word

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The development of **Shaping Our Future, NIPR Strategic Plan 2024–2026** has been an enriching process that has produced a forward-looking, tangible document to shape the coming years. This is the work of a mature leadership team with a proven commitment to honing their focus; setting ambitious, attainable goals; and consistently “leaning in” to proactively embrace organizational values.

MPK&D was pleased to be part of this excellent process. For our team, NIPR’s approach has been a case study in how strategic planning should work – led by a strong and visionary Board of Directors and CEO, supported by exceptional leadership with a shared depth of commitment to the mission.

When Kansas City Chiefs head coach Andy Reid was asked earlier this year how he felt about the Chiefs increasingly being discussed as a football “dynasty,” he waved this classification off with disinterest. “It’s important in our world, as coaches and players, [that] you try to get better every day,” he said. It’s this same steadfast spirit of dedication to mission, and visionary leadership focused on continuing to identify and accomplish new goals, that we celebrate with NIPR’s entrance into a new strategic plan. We look forward to NIPR’s continued growth and success in the coming years.

– Patricia A. Bosse  
MPK&D Founding Partner



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## APPENDIX 1

### NIPR Background

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**The National Insurance Producer Registry (NIPR)** is a not-for-profit technology company that provides cost-effective, streamlined, and uniform licensing data and compliance services for insurance professionals. An affiliate of the National Association of Insurance Commissioners (NAIC), NIPR is governed by a Board of Directors representing state insurance regulators and the insurance industry. The organization was established as a public-private partnership with the goal of streamlining the producer licensing process.

NIPR's offerings center around two core pieces of technology that provide reporting and credentialing products.

**Reporting Products:** NIPR's Producer Database (PDB) is an electronic database of insurance licensing-related information. The PDB, which complies with the federal Fair Credit Reporting Act, links participating state regulatory licensing systems into one common repository of insurance licensee information. The PDB also includes enforcement data from the Regulatory Information Retrieval System (RIRS) to provide a more comprehensive licensee profile. Today, all states, the District of Columbia, Guam, Puerto Rico, and the U.S. Virgin Islands are part of the database. PDB powers various reporting products helping producers and compliance professionals to sustain exceptional levels of regulatory compliance.

**Credentialing Products:** NIPR's technology links state insurance regulators with the entities that they regulate to facilitate the electronic exchange of licensing and other credentialing transactions.

#### **NIPR transformed the producer licensing process.**

NIPR has made significant strides to transform the state-based, insurance licensing-related process. The organization's contributions and commitment to improving the effectiveness and efficiency of insurance licensing has been recognized by the NAIC, industry, and industry trade associations.

## APPENDIX 2

### NIPR Leadership

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#### BOARD OF DIRECTORS

**The Honorable Larry Deiter**

Director

South Dakota Division of Insurance

***President, NIPR Board of Directors***

**Ms. Cari Lee**

Director of Govt. Affairs & Public Policy

Steptoe & Johnson

(CIAB)

***Vice President, NIPR Board of Directors***

**The Honorable Elizabeth Dwyer**

Director

Rhode Island Department of

Business Regulation

***Secretary/Treasurer, NIPR Board of Directors***

**Mr. Andy Beal**

Acting Chief Executive Officer

National Association of

Insurance Commissioners

(NAIC)

**The Honorable Sharon Clark**

Commissioner

Kentucky Department of Insurance

**Mr. David M. Leifer**

Vice President & Associate General Counsel

American Council of Life Insurers

(ACLI)

**Mr. Anthony Maddox**

Senior Associate - Government Relations

AFLAC, Inc.

(AHIP)

**The Honorable Glen Mulready**

Commissioner

Oklahoma Insurance Department

**Ms. Lauren Pachman**

Counsel & Director of Regulatory Affairs

National Association of

Professional Insurance Agents

(PIA)

**The Honorable Vicki Schmidt**

Commissioner

Kansas Insurance Department

**Mr. Joseph Torti III**

Vice President - Regulatory Affairs

Fairfax (US) Inc.

(APCIA)

**Ms. Jessica Waltman**

Principal

Forward Health Consulting

(NABIP)

**The Honorable Lori Wing-Heier**

Director

Alaska Division of Insurance

## EXECUTIVE TEAM

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**Karen Stakem Hornig**  
Chief Executive Officer

**Sarah Heidenreich**  
General Counsel

**Nadia Malik**  
Chief People Officer

**Eric Saul**  
Chief Product and Technology Officer

**Valeria Williams**  
Chief Operating Officer

**Laurie Wolf**  
Chief Regulatory Affairs Officer



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