GATHER TO GROW

MANAGEMENT RETREAT 2026

CONNECT INSURANCE

Fall 2026

September 30-October 1, 2026

YELLIN GROUP

Connect INSURANCE

Lay of the Land

Day One: Connect and Grow

- Mosaic Strategy
- Strengths and DiSC
  - Me
  - You
  - Others
  - Team
- Leadership Mosaic, Part 1

Day Two: Grow and Adapt

- LEAD Reflection
- CRANIUM Cohort Challenge
- Leadership Mosaic, Part 2
- Culture and Values
- ELT
- Leadership Mosaic, Part 3

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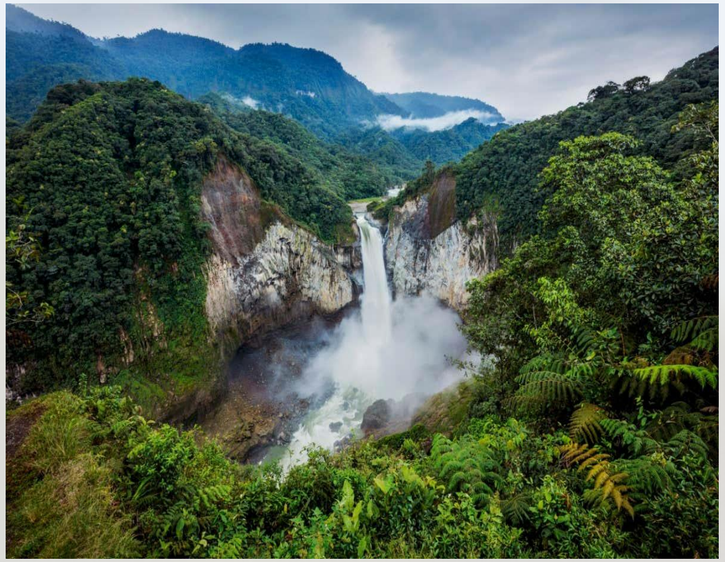

Imagine...you are one of several research teams who have gone on an expedition deep in the Amazon rainforest.

The mission quickly goes wrong for all of the teams, as the GPS malfunctions and several are bitten by poisonous spiders.

The only hope for sending a distress signal and reaching civilization requires building a 12-foot tower on top of the stone mountain.

Only the team that is first to build the 10-foot tower survives.

Your Mission: Build a 12-foot tower using nothing but the supplies you've been given.

Warning:
Bad weather is setting in.
Time is ticking.

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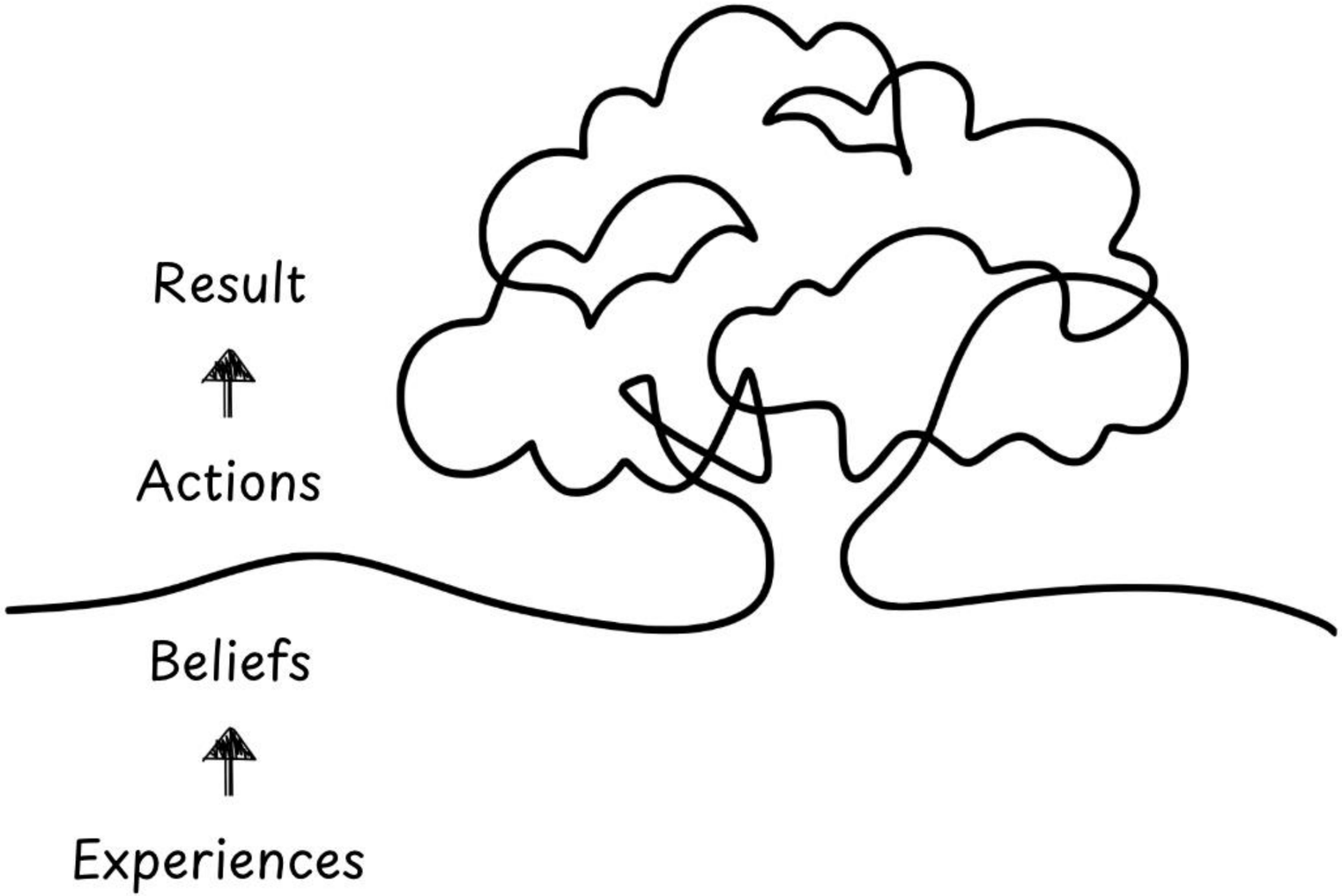

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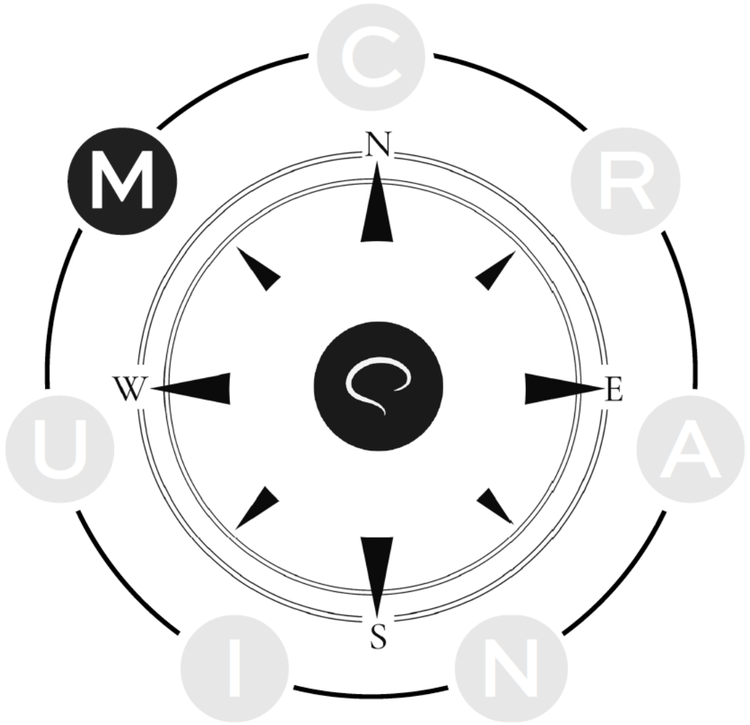
The Mosaic Strategy



**VALUE DIFFERENCES.
CREATE BELONGING.**

BIG IDEA

Belonging is not a nicety; it's a neurological necessity. Inclusion transforms unique parts into a resilient, lasting force.

BREAKTHROUGH BELIEFS

Great minds don't think alike.

Social rejection and physical pain are virtually identical in the brain.

You have a message and a style of delivering that message that hasn't been given to anyone else. Honor and protect that gift. No. Matter. What.

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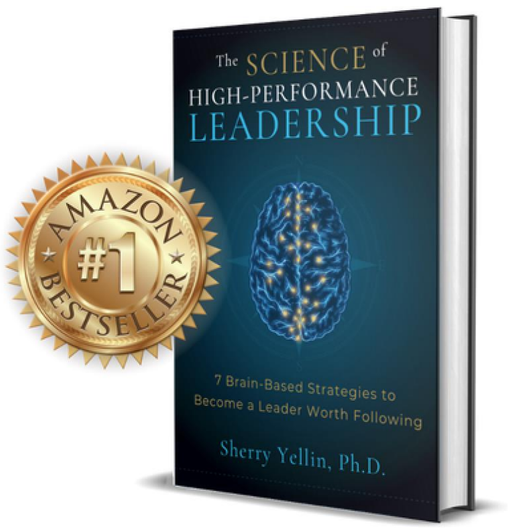
YOU'RE WIRED FOR MOSAIC

Why your brain thrives on the Mosaic Strategy

Like the art of mosaics, the Mosaic Strategy embraces the endless complexities of the brain. Each brain is as unique as its owner's fingerprints and constantly changing. The brain is a network of billions of individual parts, neurons, working efficiently to form neural networks. Your brain's neural networks result from innumerable variables, including genetics, life experiences, perspectives, strengths, struggles, talents, etc. The optimal environment is one of inclusion, where all individual differences and similarities are more than tolerated; they are valued. Like a mosaic, the ordinary combine to create the extraordinary. The whole is far greater than the sum of its parts.



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How Artist Makes the Most Complex Mosaics by Hands

https://www.youtube.com/watch?v=UzOW8MhwUc0

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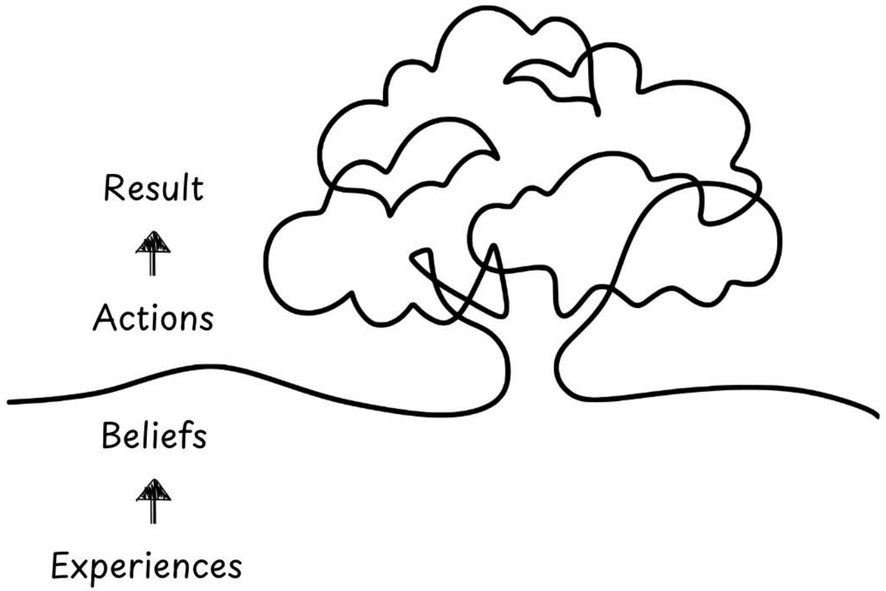
Other people don’t think or communicate like me

Great minds don’t think alike

Differences aren’t something to overcome; they are to be understood and leveraged

What would happen if we studied what is right with people instead of focusing on what is wrong with them?



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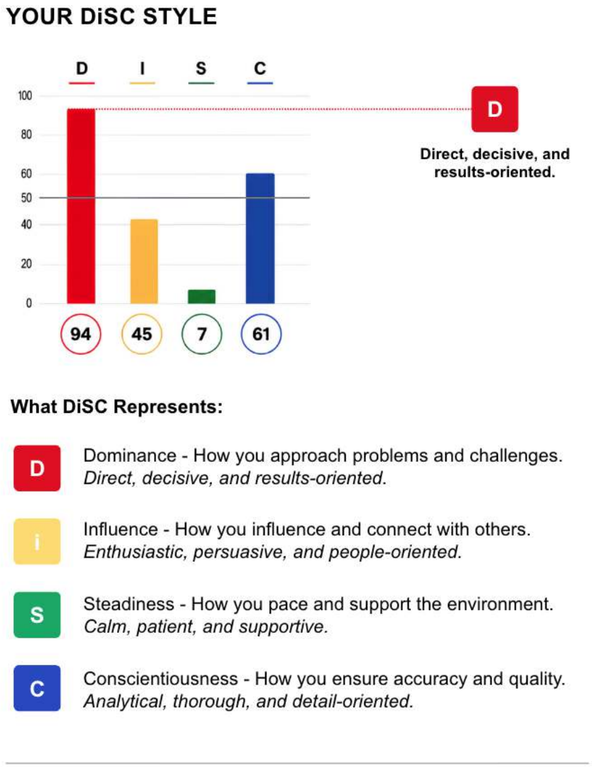
DiSC:
HOW you show up



How you communicate, respond to challenges, interact with others, and approach your work.

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CliftonStrengths:
WHAT you naturally bring



The talents and patterns of thinking, feeling, and behaving that you instinctively rely on to:

- Stay energized
- Build relationships
- Motivate others
- Interact with information

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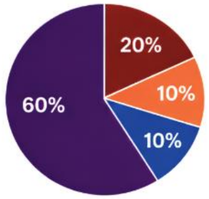
WHAT you bring + **HOW** you bring it = **How we get the best from each other**

CLIFTONSTRENGTHS®

1 Focus
2 Significance
3 Arranger
4 Relator
5 Deliberative
6 Futuristic
7 Discipline
8 Achiever
9 Responsibility
10 Analytical

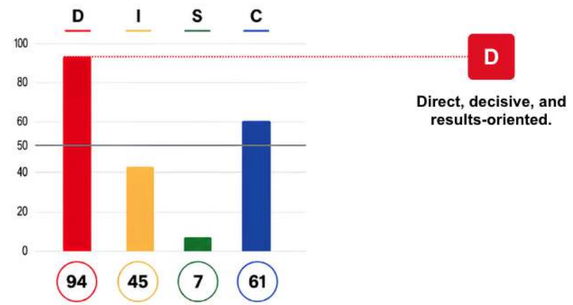
STRENGTHS DOMAINS



- Strategic Thinking
- Influencing
- Relationship Building
- Executing

I BRING	clarity through concentration and direction	a desire for wanting more	flexibility and interactivity	social depth and transparency	a thorough and conscientious approach
I NEED	a goal to establish priorities	an appreciative audience that will bring out my best	a dynamic environment	time and opportunities for 1-on-1 interactions	time to listen and think before being expected to speak

YOUR DiSC STYLE



What DiSC Represents:

- **D** Dominance - How you approach problems and challenges. *Direct, decisive, and results-oriented.*
- **i** Influence - How you influence and connect with others. *Enthusiastic, persuasive, and people-oriented.*
- **S** Steadiness - How you pace and support the environment. *Calm, patient, and supportive.*
- **C** Conscientiousness - How you ensure accuracy and quality. *Analytical, thorough, and detail-oriented.*

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This isn’t touchy, feely – happy, clappy

29 % higher productivity

19 % higher sales

15 % higher employee engagement

15 % lower turnover

53 % longer tenure

The value doesn’t come from just taking the assessments. The value comes from what leaders **do** with what they learn.

Gallup meta-analysis of strengths-based development: 43 studies, 22 organizations, 1.2M employees, 49,495 work units, 45 countries.

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What percentage of people thought they were self-aware?

95%

What percentage of people actually were self-aware?

10-15%

Tasha Eurich.

Insight: Why We're Not as Self-Aware as We Think, and How Seeing Ourselves Clearly Helps Us Succeed at Work and in Life.

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KNOW ME

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4 5-minute Lightning Rounds

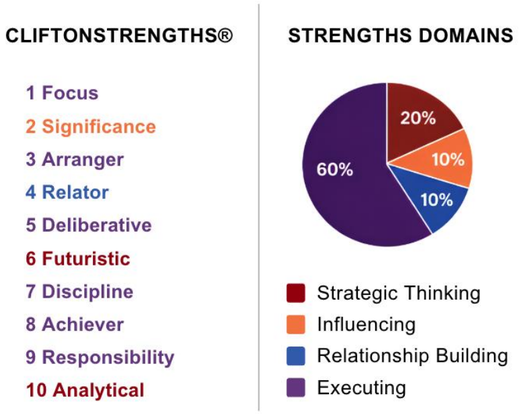
Using your cards, each person takes 1 minute to share using the prompts.

Round 1: *At my best…*

Round 2: *Under pressure…*

Round 3: *People sometimes misunderstand…*

Round 4: *To get the best from me…*



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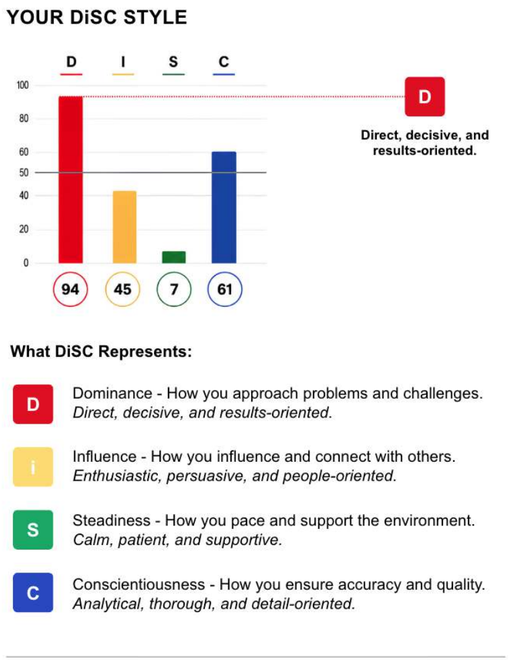

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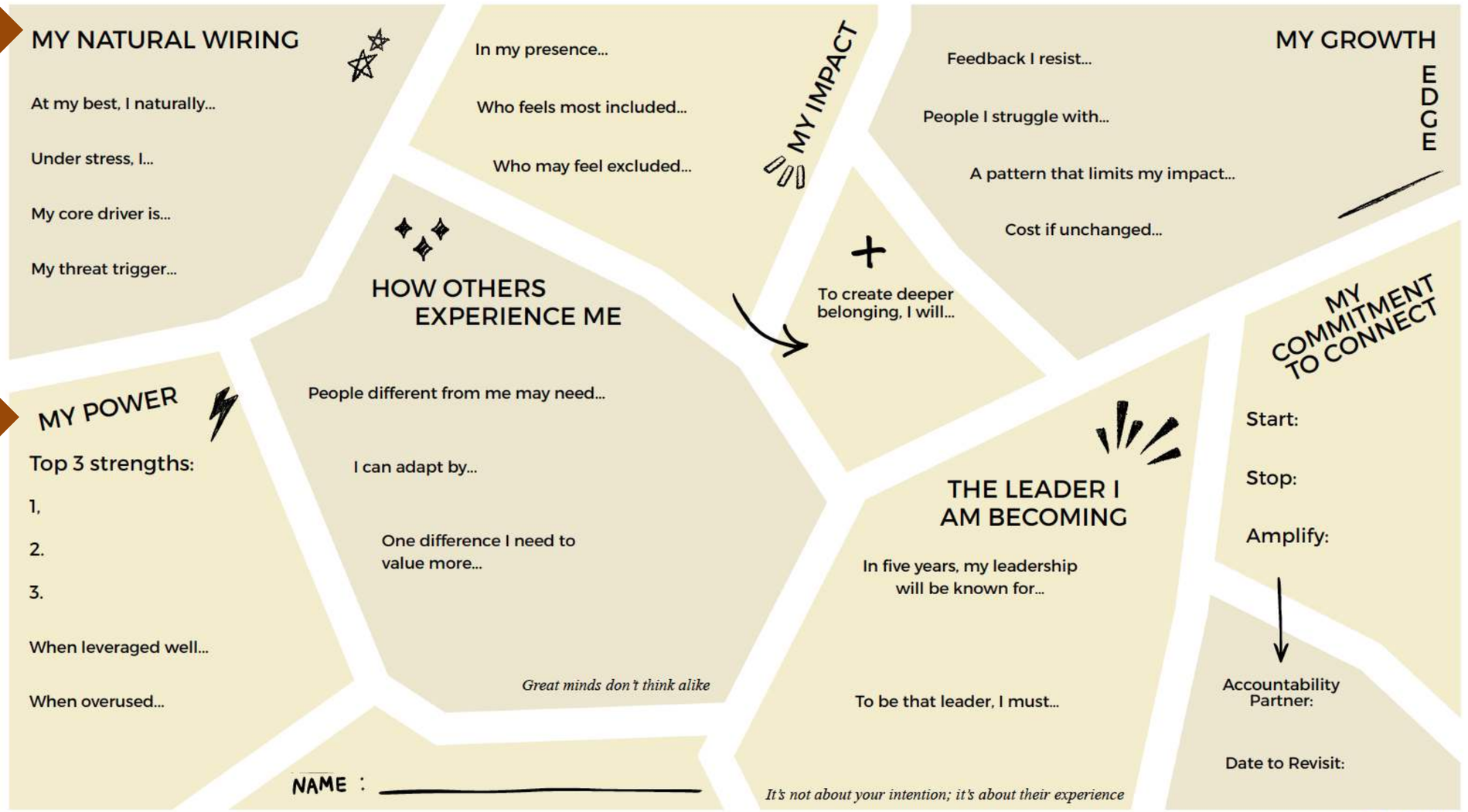
My Leadership Mosaic



Great minds don't think alike

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KNOW YOU

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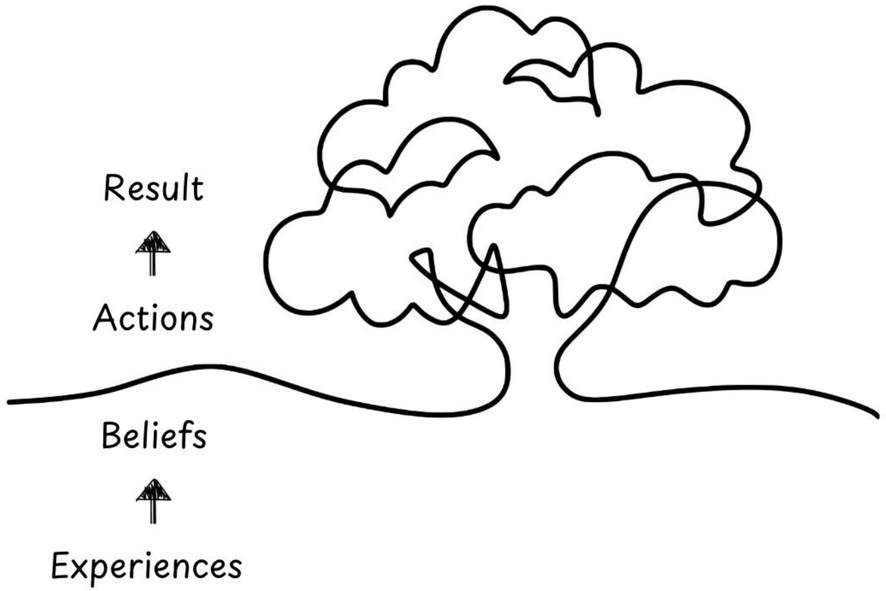
Communication means “to connect”

Sooner is smaller; later is larger

What you say is not what they hear

It’s not about your intention; it’s about their experience



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- Review the scenario
- Study your partner’s cards
- Partner A: Knowing what I know about you, I would…
- Partner B: Make any corrections
- Switch

Scenario 1:

> *I need to disagree with you. I see things differently. We are in conflict.*

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- Review the scenario
- Study your partner’s cards
- Partner A: Knowing what I know about you, I would…
- Partner B: Make any corrections
- Switch

Scenario 2:

> *I need your buy-in on a major change.*

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- Review the scenario
- Study your partner’s cards
- Partner A: Actually have the conversation. Choose your first 5 words carefully.
- Partner B: Make any corrections
- Switch

Scenario 3:

> *You need to address a major mistake your partner has made.*

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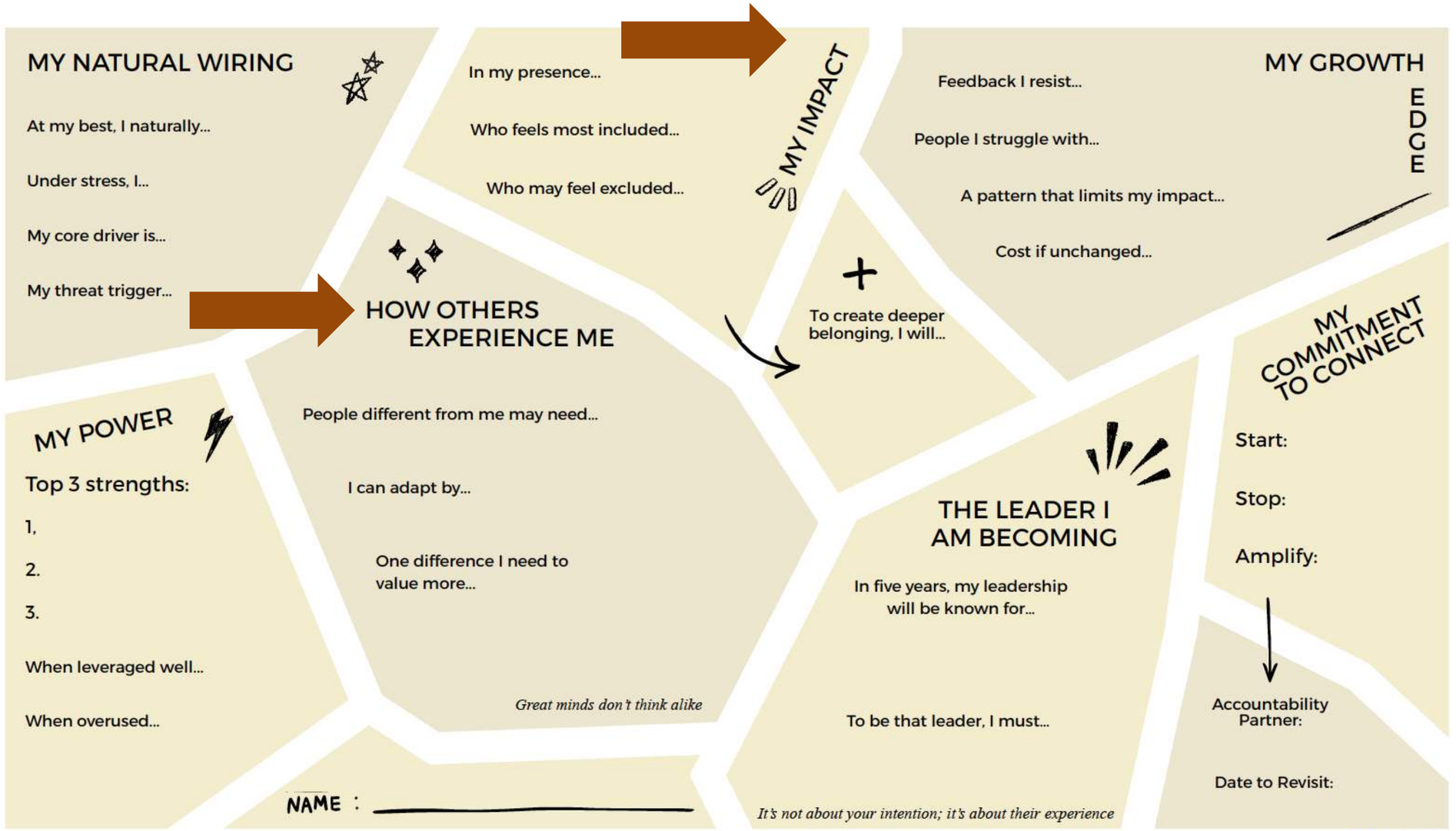
My Leadership Mosaic



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BUILD THE TEAM

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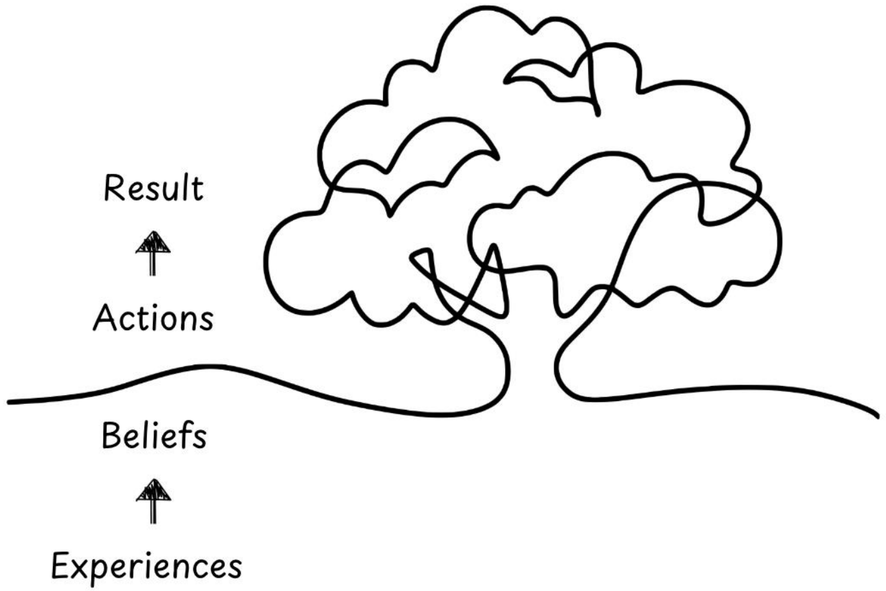
Great leadership isn’t about wishing you had a different team.

It’s about understanding and maximizing the talent in the team you have.



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Read the business challenge.

Take 5 minutes to evaluate the talents on the team (individually and collectively)

In relation to the business challenge:

- How can this combination work?
- Where is the team particularly strong?
- What are potential blind spots?
- Where could this combination get us into trouble?

Each team gives a 60-second pitch convincing us that this team can meet the challenge.



Connect needs to add a significant number of employees over the next year.

Leadership wants to grow quickly without losing the culture and relationships that helped make the company successful.

Your team must be able to develop a strategy for scaling both talent and the culture.

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Connect has an opportunity to introduce new AI/automation into parts of the customer and employee experience.

It could improve speed and efficiency, but there are concerns about accuracy, adoption, customer trust, and losing the human touch.

Your team will evalute the opportunity and recommend where Connect should and should not use the technology.

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Connect's growth is strong, but leadership recognizes that acquiring customers isn't enough.

Your team is charged with identifying three ways Connect could significantly increase customer loyalty and retention over the next twelve months.

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KNOW US

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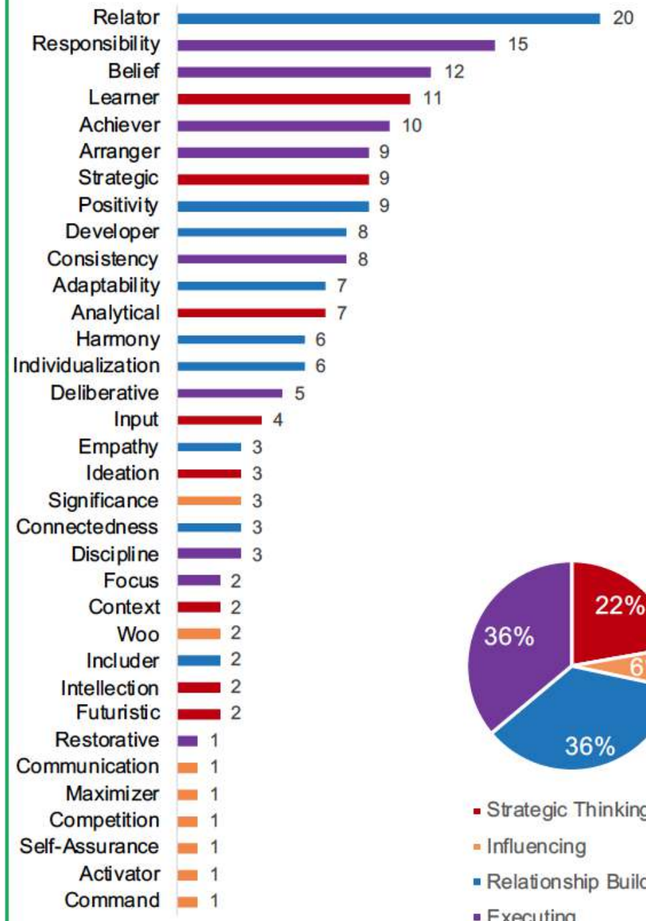
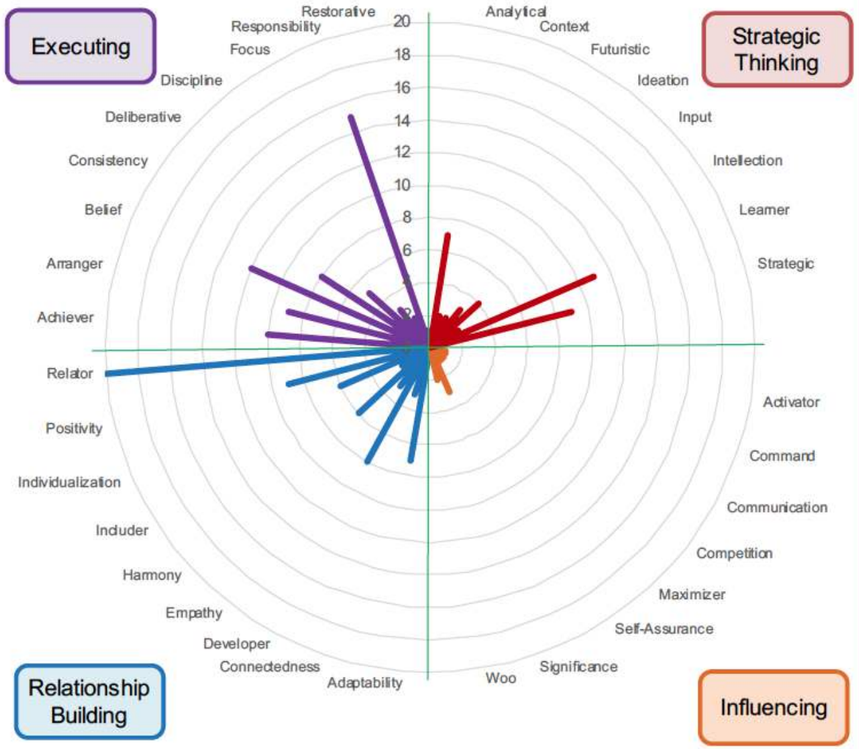
Team Summary





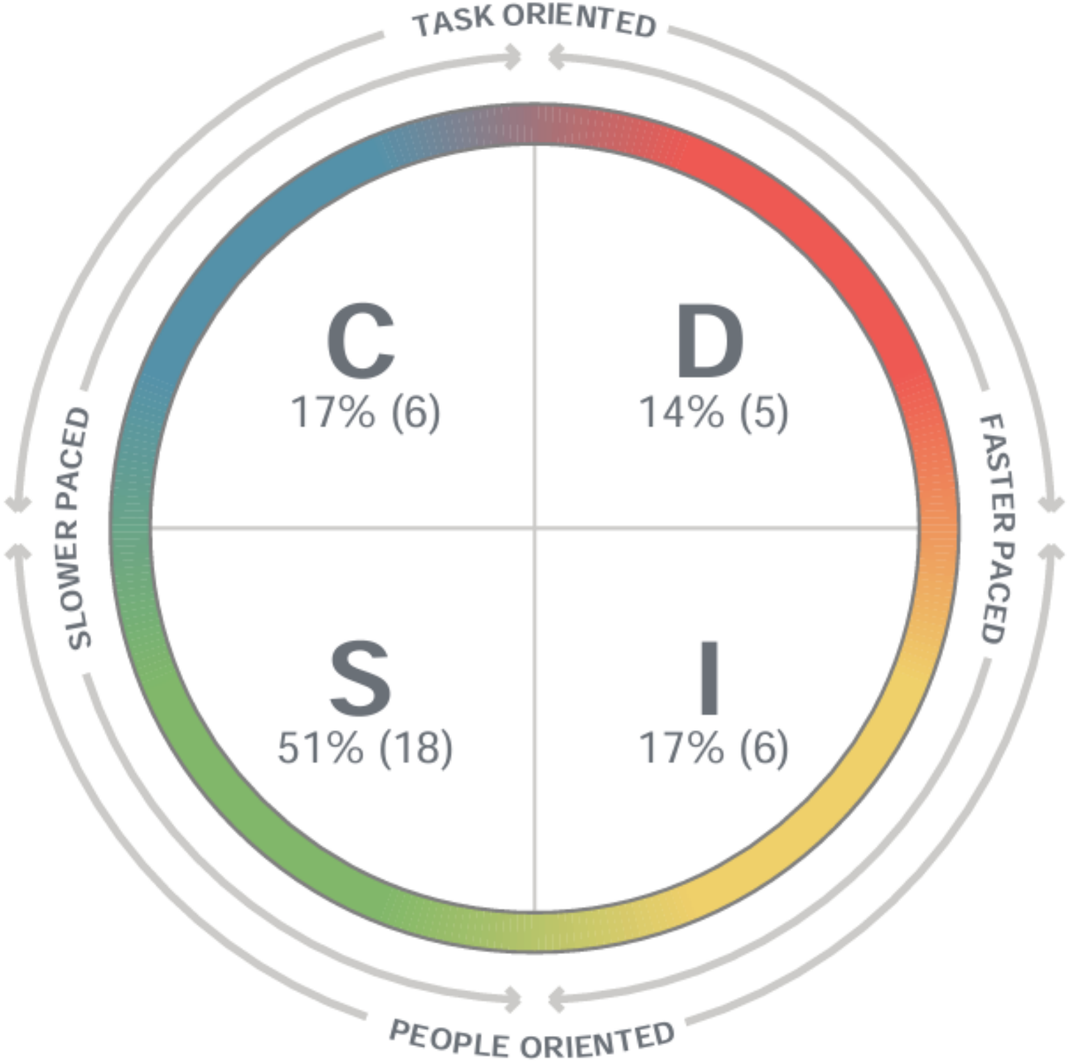
Domains	People	Themes
Strategic Thinking	24	40
Influencing	10	11
Relationship Building	33	64
Executing	32	65

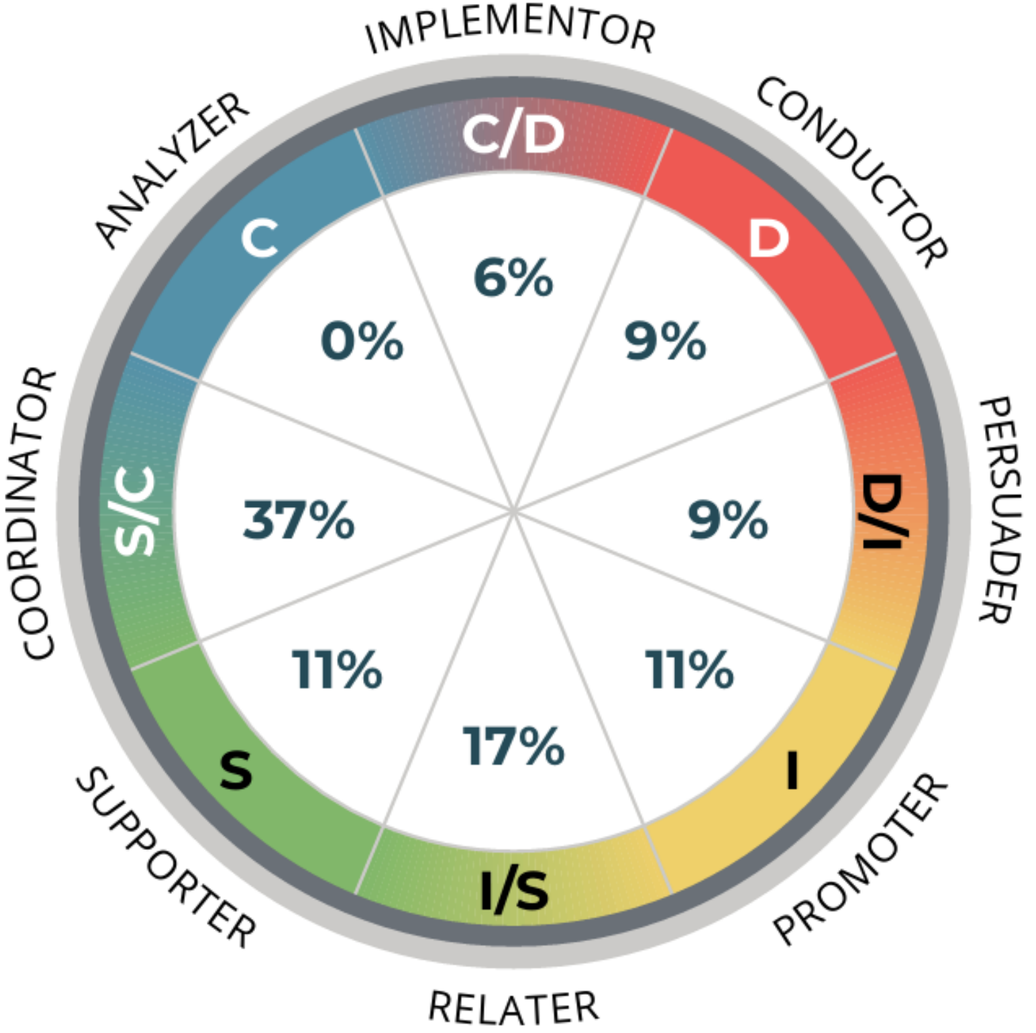
36 People

Team Top 5		As a team we bring	As a team we need	As a team we are motivated by
56%	**Relator**	social depth and transparency	time and opportunities for one-on-one interactions	close, caring, mutual relationships
42%	**Responsibility**	dependability and loyalty	freedom to take ownership	the respect of others
33%	**Belief**	stability, clarity, and conviction	a cause or purpose for which to live	altruism
31%	**Learner**	a learning perspective	exposure to new information and experiences	to live on the frontier / the cutting edge
28%	**Achiever**	intensity and stamina of effort	freedom to work at my own pace	completing tasks

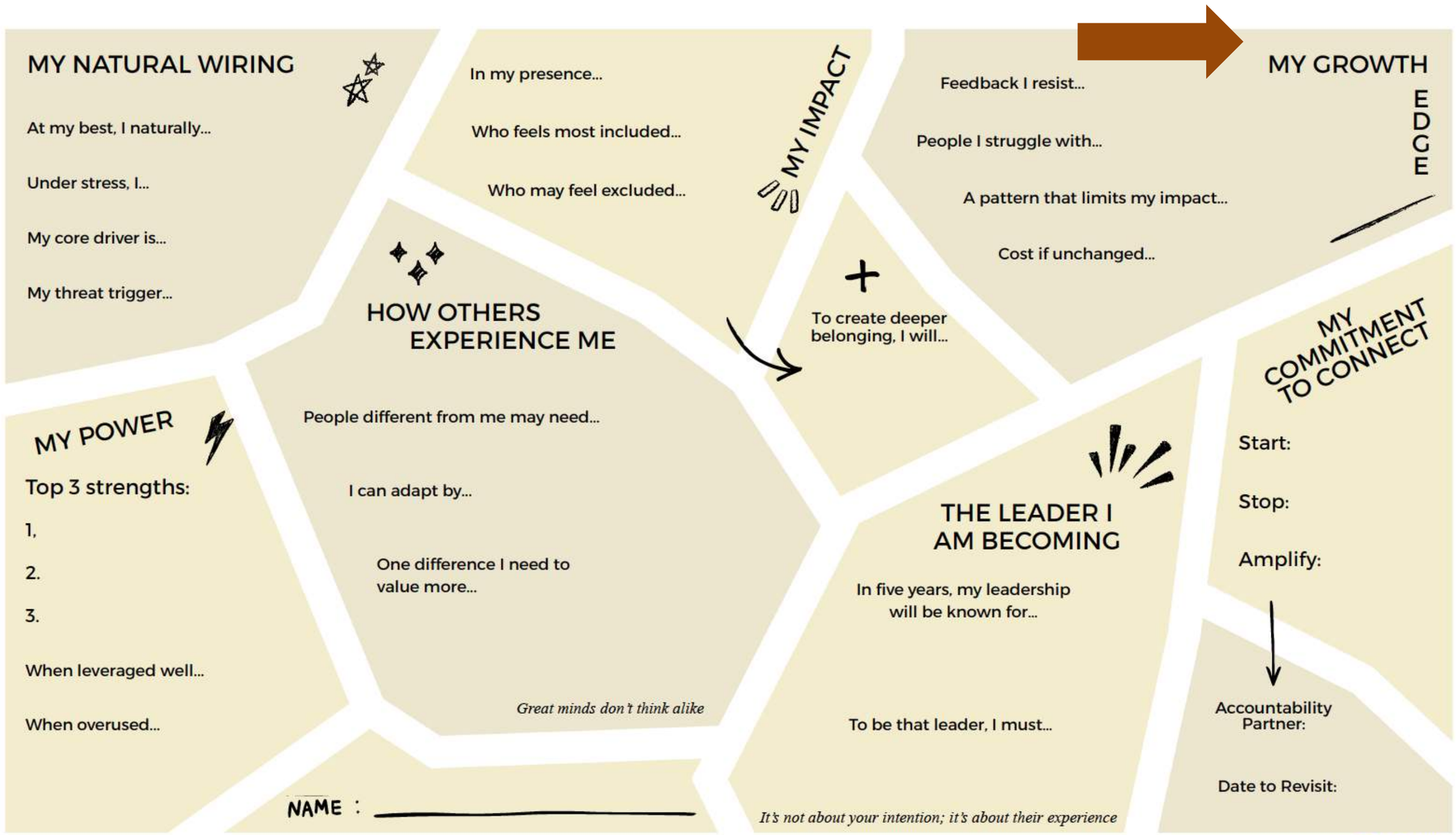
Representing the Top 5 Themes

Prepared by Lance Blakley - The Learning Connection


TASK ORIENTED
SLOWER PACED
FASTER PACED
PEOPLE ORIENTED
C
17% (6)
D
14% (5)
S
51% (18)
I
17% (6)


IMPLEMENTOR
CONDUCTOR
PERSUADER
PROMOTER
RELATER
SUPPORTER
COORDINATOR
ANALYZER
C/D
D
D/I
I
I/S
S
S/C
C
6%
9%
9%
11%
17%
11%
37%
0%

My Leadership Mosaic



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Everyone scores

Do not vote for your cohort

The maximum score is 25

In case of a tie in the average score, the tie breaker will go to the Investment score

The CRANIUM Cohort Challenge

Leadership Investement Scorecard

Presentations will be scored based on the following criteria:

1 - Not Yet
2 - Needs More
3 - Promising, I'm listening
4 - Strong
5 - Wow, I'm In

Criteria	Points
The Big Idea Clearly identified one leadership behavior aligned with the assigned CRANIUM Strategy. Is the recommendation focused, compelling, and worthy of organization-wide adoption?	5
The Business Case Made a persuasive case for why this behavior matters using evidence, stories, observations, neuroscience, and/or the cost of the current reality.	5
The Experience Created an engaging, memorable, and brain-friendly experience that allowed us to feel the leadership behavior rather than simply hear about it.	5
The Investment Presented practical implementation ideas and a meaningful Hardwiring Tool (leave-behind) that would help embed the behavior into Connect's culture.	5
The Pitch Demonstrated executive presence, teamwork, creativity, professionalism, and persuasive communication worthy of executive investment.	5

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If someone discovered a mosaic of Connect 2000 years from now, what story would it tell about the culture?





- What did we protect?
- What did we reward?
- How did we treat one another?
- What principle did we stand on when things got hard?
- What did leaders tolerate?
- What did leaders refuse to compromise?

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Relative to your assigned value:

Top Section
When Connect is at its best, what do people experience that we never want to lose?

Middle Section
As Connect grows, what could become harder to maintain or unintentionally lose?

Bottom Section
What will leaders need to intentionally do to protect and strengthen this value?



Diversity: Embrace and promote diversity…. Strength lies in differences, not in similarities.

Service: Provide excellent, fair service to our insureds, producers, and claimants.

Work Environment: Provide a sense of family and a work environment of mutual support and growth where employees are respected and valued and provided opportunities to grow and succeed with the Company.

Value: Provide value to our producers by offering a consistent competitive product that can be sold in all types of market cycles.

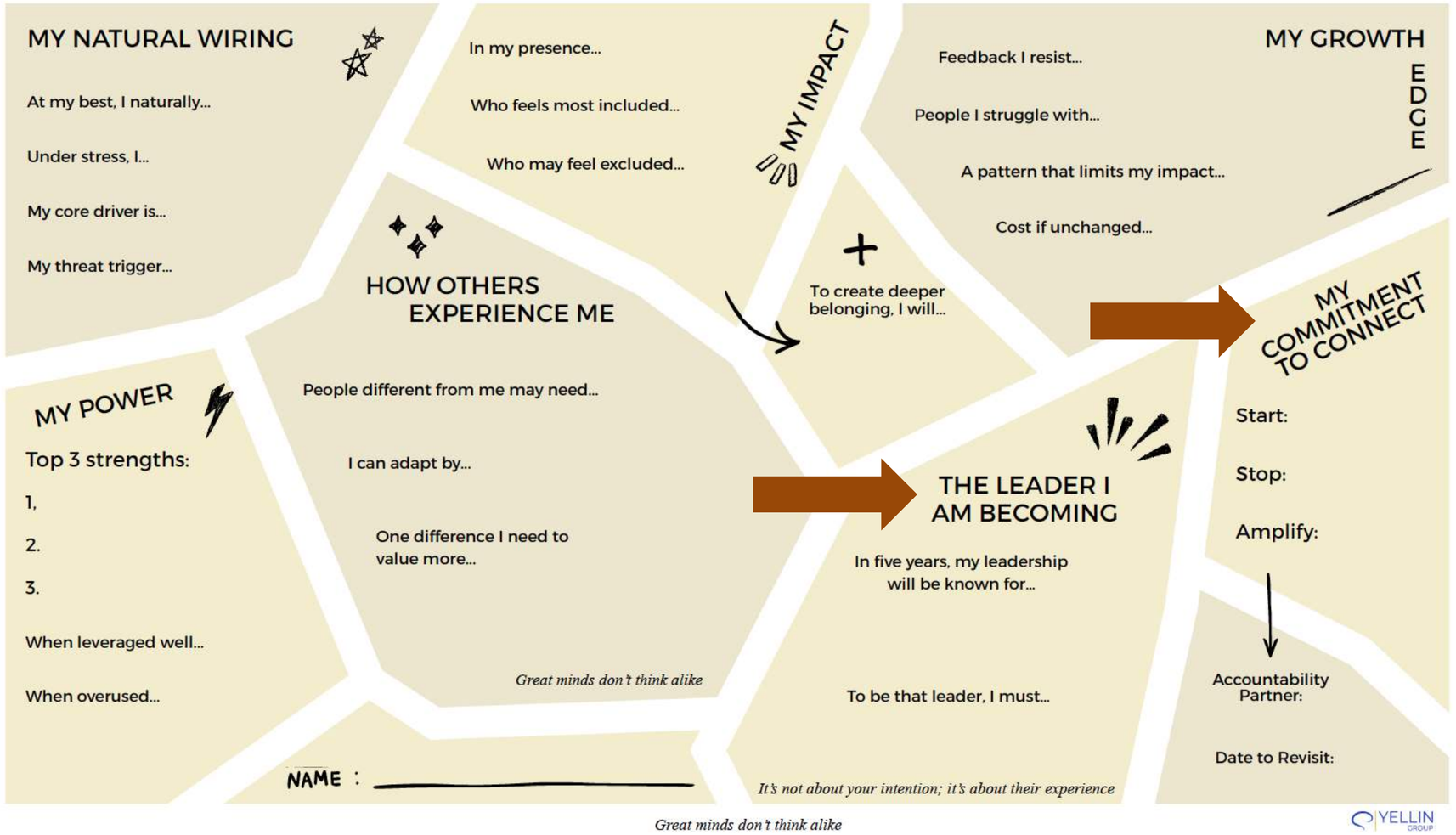
Integrity: Being honest and applying strong moral principles to our day-to-day business practices.

Success: Creating consistent company accomplishments and sharing those accomplishments with employees and owners.

Passion: Approaching our business with enthusiasm, capturing the energy and excitement of being one of the best companies in the Non-Standard Auto Space.

CULTURE

My Leadership Mosaic



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30-Day Check-In

Purpose: Review your completed Leadership Mosaic

Even better if: You continue to meet as accountability partners

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What ONE WORD represents the leadership commitment this team can count on you to bring to 2027?

In 2027, this team can count on me for

Write your one word (larger)
Your name (smaller)

What ONE WORD represents the leadership commitment this team can count on you to bring to 2027?

In 2027, this team can count on me for

Write your one word (larger)
Your name (smaller)




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GROUP
Unforgettable Leadership. Unforgettable Results.