

# Speaker Information Form



## Speaker Information

### Speaker Name

Caroly Hofstee  
Shannon Jones  
Katherine Strong

### Email

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### Location

Grand Rapids; Flexible  
Grand Rapids, Flexible  
Grand Rapids, Flexible

## Speaker Biography & Credentials

Please see attached bios

## Session Information

### Session Title

**Guiding Principles for Building An Intentional Culture**

### Session Description

Your company's culture is, in essence, the foundation of your brand. What occurs internally is carried over into customer service and buyer satisfaction. You may be at the point where you have identified a need to shift culture, but now what? Learn foundational and practical steps toward achieving change. Take a journey through the process of adopting principles and practices that will allow you to develop and customize your own framework for creating intentional culture. Walk away with insight and best practices, as identified by senior level executives at the human resource, operational, and presidential levels.

### Learning Outcomes

- Review the order of steps for strategically creating and implementing change
- Review how to ensure you have the right people in the right seats
- Develop a process for implementing open lines of communication
- Identify key business components that must be managed and embraced as part of the process

# Caroly Hofstee

President & Chief Executive Officer



Caroly is the President & CEO of HUB International Midwest East Limited .

She is responsible for strategic organizational direction and growth of the region. In her role as President, Caroly has responsibility for Executive Leadership for all business channels and is an avid believer in maintaining an employee centric culture that supports HUB's customer centric mission. In addition she is directly involved in Merger & Acquisition for the region from identification through implementation. Caroly maintains relationships with key carriers, clients and stakeholders. Aside from leadership, she continues to maintain a book of clients acting as their broker.

Caroly began her insurance career at a Third Party Administrator where she was responsible for agency relationships. In 2008 she joined HUB International as an Employee Benefits Producer where she won numerous awards for sales. She was instrumental in developing the employee benefits sales platform at MWE which would later lead to record growth for the MWE EB team.

In 2012, she moved into the Chief Sales Officer position for the region and took over responsibility for growing and developing the sales team. Then in 2017, Caroly moved into the President/CEO position at HUB MWE .

## Education & Licenses

- Life and Health License
- Property and Casualty License
- Certified Professional Behavior Analyst
- Certified Professional Values Analyst
- Bachelor of Biomedical Science - Western Michigan University

## Honors and Awards

- 2012 Top Employee Benefits Consultant– Risk and Insurance Magazine
- Two time Gladiator Sales Award Winner– HUB International
- 2010 US Retail Rookie of the Year– HUB International

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# Shannon Jones

Human Resource Director



Shannon Jones is the Human Resource Director for HUB International's Midwest East region and sits on the region's executive leadership team. With a combined 10 years of Human Resource management experience, Shannon's passion is helping people love where they work. She has dual degrees in Human Resource Management and Psychology from Michigan State University and the PHR and SHRM-CP certifications.

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# Katherine Strong

Chief Operating Officer



Katherine is the Chief Operating Officer for HUB Midwest East. She first came to HUB as an employee benefits Account Executive, and prior to that honed her financial skills in the actuarial field.

As Chief Operating Officer, Katherine is responsible for managing regional financials including budget, forecast, and expense management. She also oversees the management of systems, facilities, and IT, and is a key component of HUB Midwest East's M&A integration process. She has also worked to improve HUB's Business Intelligence tools, and has developed new reporting and tracking methods for all three business channels. Lastly, Katherine oversees the region's real estate strategy development and management.

## Education

- MBA, University of Michigan
- Master's of Education, University of Michigan
- Bachelor's of Science in Math, Physics, Spanish and English, Calvin College

## Insurance Licenses

- Life, Accident & Health Insurance License
- Property & Casualty Insurance License.

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