

2019 CONFERENCES

International Agency Transformation Forum

From Quantity to Quality in China



Mark your calendar and
join us in Shanghai!
www.limra.com/IATF19

May 22 – 23, 2019
Grand Kempinski Hotel Shanghai
Shanghai, China



www.limra.com



www.loma.org

2019 International Agency Transformation Forum

From Quantity to Quality in China

Join us at this two-day strategic conference discussing the trends and innovations shaping agency transformations in China, and around the world. Chief executives, general managers, and channel heads (both in the home office and at the branch level), as well as individuals responsible for strategic planning, recruiting, training, and distribution channel management will all benefit from the content and research being presented, and attendees will also have ample networking opportunities to compare best practices and technologies. Read on for more information on this year's program!

Featured Presentations

Opening Remarks



DAVID LEVENSON

President and Chief Executive Officer
LIMRA, LOMA, and LL Global, Inc.

Opening Keynote: Agency System Innovations



JOHN CAI

Regional Chief Executive
AIA Group Limited

21st Century Goal Setting to Exponentially Increase Retention and Productivity



JOHN T. BAIER

Chairman and Co-Founder
25 Point Systems Inc.

John Baier, GAMA International's 2013 Hall of Fame Inductee, will share personal case study experiences and best practices for successful agent retention and productivity results. Based on his industry-renowned 25 Point System, he will share his approach for strategic planning (from tracking daily activity to setting a long range vision), as well as how this planning technique has vastly improved with mobile technology. John will also share insights on why most goal setting fails and methods to avoid common traps – for both new and veteran advisors.

AI Meets Risk Intelligence: A Case Study of AI-powered Healthcare



JASON LIU

CEO
Leapstack, Inc.

Jason Liu will share real life case study examples on how companies can use AI to improve the timeliness of health claim settlements, as well as decrease the level of fraudulent activity payouts. Attendees will also hear how the proper use of big data can help agents to match the right products to the right people, and sell more accurately priced products and services to the customers they service.

Recruiting & Selecting Today's Top Talent



RICK FUNKE

Assistant Vice President,
Assessment and Development Solutions
LIMRA and LOMA

In this session, Rick will present what today's top sales talent are looking for in a career and how recruiters are using that information to attract and connect with today's sales talent. Additionally, Rick will share insights on the profile of China's best candidates, and best practices in the selection process that will not only yield more quality agents, but also creates a positive experience for the candidate.

From Quantity to Quality: Fundamentals of a High Quality Recruiting Strategy



CHRIS AU

Regional CAO
Manulife Financial Asia, Ltd.

Recruiting the best talent begins with knowing what the look for, and how to support it. Chris Au will share key insights on how to improve your fundamental agency platform, where to source top quality leads, and how to differentiate yourself from the competition. He will also offer suggestions on timelines and tolls to help with the selection process, as well as ideas on how to train and develop your top talent to ensure they stay with you as they grow in their career.

Innovations in Field Team Management



HONGYOU CHEN

Sales Head, First Regional Area
Ping An Insurance Company of China, Ltd.,
Shanghai Branch

Mr. Chen Hongyou will share how Ping An's Shanghai Branch is utilizing technology to create a customer-centric ecosystem that allows them to develop and maintain a highly productive business. Their simple, efficient approach allows them to efficiently manage customer activity in order to continue to grow both sales and revenue, while simultaneously strengthening a high quality, high performing team.

Digital First Marketing — Helping Agents Sell More, and Service Their Customers Better



HUGH TERRY

Founder
The Digital Insurer

In this presentation you will learn why digital first sales are an unstoppable trend. And how are technology solutions like microsites and multi-channel push-based marketing tools allowing agents to provide better service than ever before? Hugh will discuss these questions, along with multiple examples of different technology solutions that can be used to increase sales and improve client satisfaction.

CAO Panel: Creating a Quality-Driven, Customer-Centric Agency Operation



JAMES CHANG

Senior Vice President
AVIVA-COFCO Life Insurance Co., Ltd.



XIAOHONG SUN

Vice President
Aeon Life Insurance Company Ltd.



DAVID YU

Chief Agency Officer
Sino-US United Metlife Insurance Company Limited



EDWIN SI

Managing Director, China
LIMRA and LOMA

Do your agents have the tools they need to portray your organization as high-quality and customer-centric? And how does your organization ensure that the customer's best interest remains a top priority, even when it conflicts with overall company profits? Panelists will share their thoughts on these questions and others, as they discuss the best strategies and approaches for designing and maintaining a high quality agency operation that is both customer-centric and profitable.

Successful, Profitable Agency Distribution Models

Receive case study examples on how three top insurers from China, Japan, and the United States have created and maintained successful, profitable agency distribution models. You will hear about the various strategic transformations they chose to undertake to remain relevant in today's competitive landscape, the external factors that influenced these decisions, as well as the challenges and setbacks they faced along the way. Tactical examples and practical takeaways will be provided, as well as predictions on what their future agency strategies might include.

International Agency Transformation Forum



REGISTRATION INFORMATION

Register from 5 February to 30 April

LIMRA or LOMA Member – US\$550

Nonmember – US\$630

Register in May 2019

LIMRA or LOMA Member – US\$650

Nonmember – US \$730

Multiple Registration Discounts Available: The more you send, the more you save! Receive 5 percent off the price of each registration when your company registers 5-9 delegates, 10 percent off each registration when sending 10-19 delegates, and 20 percent off each registration when sending 20 or more! For details on how to receive the discounted group rate, please email Mr. Jinhai Guo at guoj@loma.org.

To Register: Visit www.limra.com/IATF19 and click the orange REGISTER button!

HOTEL INFORMATION



Grand Kempinski Hotel Shanghai

1288 Lujiazui Ring Rd.

LuJiaZui, Pudong Xinqu

Shanghai, China 200120

Make your room reservation at the **Grand Kempinski Hotel Shanghai** and mention the **LIMRA & LOMA International Agency Transformation Forum** to receive the discounted group rate of CNY 1,200 per night (inclusive of all tax and service charges). This special conference rate is available three days prior and three days after the meeting dates, and includes a daily buffet breakfast and in-room internet access.

To make your hotel reservations, please call the hotel directly at +86 21 3867 8888 and mention the **LIMRA LOMA International Agency Transformation Forum**, or visit the event page for the online booking link.

For more information please contact Mr. Jinhai GUO at guoj@loma.org or visit www.limra.com/IATF19 to view the latest agenda updates, learn about the speakers, and register online.

SCHEDULE AT A GLANCE

Wednesday, 22 May, 2019

7:30 – 17:00	REGISTRATION OPEN
8:30 – 9:25	OPENING REMARKS
9:25 – 10:15	OPENING KEYNOTE
10:15 – 10:45	NETWORKING BREAK
10:45 – 12:15	GENERAL SESSIONS
12:15 – 13:15	LUNCH
13:15 – 15:15	GENERAL SESSIONS
15:15 – 15:45	NETWORKING BREAK
15:45 – 17:30	GENERAL SESSIONS
17:30	COCKTAIL RECEPTION

Thursday, 23 May, 2019

8:00 – 8:45	REGISTRATION
8:45 – 10:30	GENERAL SESSIONS
10:30 – 11:00	NETWORKING BREAK
11:00 – 12:30	INSURTECH EXECUTIVE PANEL
12:30 – 13:30	LUNCH
13:30 – 14:00	GENERAL SESSION
14:00 – 15:00	CAO PANEL
15:00 – 15:30	NETWORKING BREAK
15:30 – 16:30	CLOSING KEYNOTE

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