

PROGRAM



2016 ENROLLMENT TECHNOLOGY STRATEGY SEMINAR

MARCH 1-2, 2016 • OMNI CHARLOTTE HOTEL • CHARLOTTE, NC

*Delivering Better
Outcomes*



Enrollment Technology Strategy Seminar

Tuesday, March 1

REGISTRATION — 7:00 to 8:30 a.m.
Grand Ballroom Foyer

BREAKFAST/NETWORKING — 7:30 to 8:30 a.m.
Poplar/Dogwood

WELCOME REMARKS — 8:30 to 8:45 a.m.
Birch/Willow

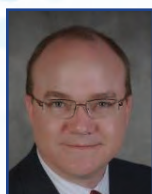
INAH CHAMBERS
Client Relationship Director & Staff Representative,
U.S. Client Services
LIMRA

GENERAL SESSION 1 — 8:45 to 10:00 a.m.
Birch/Willow

Technology Based Marketing Using Big Data



JOHN ERICKSON
Vice President, Analytics & Research
Esurance



BRANDAN BRUCE, Moderator
Director, Sales and Enrollment Technology
Voya

Big data is one of the most talked about items in the industry. Come listen to a leading internet company talk about how they utilize big data and web technology to sell their insurance products directly to consumers. You'll walk away with a better understanding of:

- Data technics that are being used today in D2C
- Ideas for harnessing big data to better educate employees about your products and services

LIMRA RESEARCH PRESENTATION — 10:00 to 10:45 a.m.
Birch/Willow

What Do Employers Really Want, Anyway?



KIMBERLY A. LANDRY
Senior Analyst, Insurance Research, Product
LIMRA

As the industry creates new and better tools to support benefits communication and enrollment, it is important to remember that the only truly useful resources are the ones that employers are willing to share with their employees. How do employers want to approach benefits enrollment, and what tools do they value? Come hear the results of the latest LIMRA research that explores these issues, including:

- Do employers' enrollment preferences align with those of employees?
- What's holding some employers back from moving to electronic enrollment?
- What features do employers look for in a benefits platform?

REFRESHMENT BREAK — 10:45 to 11:00 a.m.
Poplar/Dogwood

CONCURRENT SESSIONS — 11:00 a.m. to 12:00 noon
Pomodoro Room

1. Enrollment Basics — How Does an Effective Enrollment Strategy Drive Employee Engagement and Participation Using Technology?

The voluntary benefits industry is experiencing welcome advancements in enrollment technology. But there are some big challenges. How can we stay true to voluntary enrollment principles, enhance the enrollment experience, and increase participation?

- Identify the importance of incorporating basic enrollment success factors into your enrollment technology strategy.
- Learn from forward thinking industry leaders how you can leverage technology to optimize employee engagement.
- Understand the essential elements of a successful employee self-service enrollment — elevating the employee experience while achieving participation levels on par with traditional enrollment methods.

JOE FERNANDEZ, President and Chief Executive Officer, The Benefit eXpert (TBX); **WILLIAM A. (TINKER) KELLY**, President and CEO, VEBA; **TERRY LUCAS**, A&H New Channel Business Lead, MetLife; Moderator: **JOE MITCHELL**, Assistant Vice President, Enrollment Technology and Member Services, Lincoln Financial Group

Delivering Better Outcomes

Oak Room

2. AbraCadabra — The Magic of ACA Reporting — 2016 and Beyond

This interactive session will allow the attendees to gain a better understanding of what the challenges were with gathering employee data in 2015 and what challenges the employers face in 2016 and beyond. Attendees will also learn how the use of technology may help employers overcome these hurdles and how to prepare for the changing requirements.

DON CAHALAN, Chief Distribution Officer, Accord Systems;
DR. KRISTIN L. KAHLE, Founder and Chief Executive Officer, NavigateHCR; **ALLISON MANNO, CHRS, PHR**, Vice President, Compliance & Client Services, Health E(fx); *Moderator: DEB DESMYTHER*, Technology Solutions Consultant, The Hartford

Cypress Room

3. Recommendation Engines, Not Just Another Pretty Face

This informative session will separate fact from fiction and provide insight into tools that truly help employees make the right benefit decisions for them.

- Why are product recommendation tools gaining popularity?
- What are employee-consumers looking for to help guide their decision-making process?
- How can these tools help employers with product strategy?

JEN DANIEL, Assistant Vice President, Carrier Development, Businessolver; *Moderator: ALAN MARSHALL*, Vice President, Business Development, e-Commerce, Transamerica

LUNCH — 12:00 noon to 1:00 p.m.

Poplar/Dogwood

WORKSHOPS ARE REPEATED — 1:00 to 2:00 p.m.

Pomodoro Room

1. Enrollment Basics — How Does an Effective Enrollment Strategy Drive Employee Engagement and Participation Using Technology?

Oak Room

2. AbraCadabra — The Magic of ACA Reporting — 2016 and Beyond

Cypress Room

3. Recommendation Engines, Not Just Another Pretty Face

REFRESHMENT BREAK — 2:00 to 2:15 p.m.

Poplar/Dogwood

GENERAL SESSION 2 — 2:15 to 3:30 p.m.

Birch/Willow

Enrollment Optimization 101 — “Know Your Customer and Act Accordingly”



BILAL KAZMI
AVP, Innovation and Analytics
Sun Life Financial



ANDREA SAVAISTRA
Director, Marketing Employer Group
The Hartford



PATRICK G. TONER
Founder & Chief Executive Officer
Customer Benefits Analytics, LLC



JAMIE WALKER
Vice President, Product and
Consumer Engagement
Plan Source



STEPHEN PITZER, FLMI, CSP, Moderator
Director, Workplace Voluntary Benefits
Humana

The new focus on employees is dramatically changing the way we need to market and sell voluntary products. Success in our evolving marketplace hinges on our recognition of and response to this dynamic.

- Learn how consumer data analytic and enrollment technology advancements can be leveraged to elevate the employee enrollment experience and your ROI.
- Hear about what others are doing to cultivate existing capabilities as they progress along their “consumer centric” journey.
- Know the key success factors — what is working and what should be avoided.

Enrollment Technology Strategy Seminar

SPONSOR PRESENTATION — VITECH — 3:30 to 4:00 p.m.



Birch/Willow

Self-Service and Mobile Based Engagement Strategies

FRANK VITIELLO

*President
Vitech*

New growth opportunities, new competition, new market demands, and an ever more sophisticated consumer all make an effective customer engagement strategy more critical than ever. It is no longer enough to send a letter or email, today's consumers demand an omnichannel experience. Your customers want real-time access, from a variety of touchpoints. This session will explore the vast potential of self-service and mobile-based offerings as a powerful means of achieving an omnichannel customer experience so that you can increase enrollment and service levels, improve renewal rates and contain operating costs.

REFRESHMENT BREAK — 4:00 to 4:15 p.m.

Poplar/Dogwood

HOT TOPICS ROUND TABLE DISCUSSIONS

— 4:15 to 5:15 p.m.

Sponsored by



Birch/Willow

CHUCK JOHNSTON, Co-Moderator

*Chief Marketing Officer
Fineos*

MICHAEL LEARNED, Co-Moderator

*Senior Product Manager
Fineos*

RECEPTION/DINNER — 6:30 to 9:00 p.m.

The NASCAR Hall of Fame

Wednesday, March 2

BREAKFAST — 7:15 to 8:00 a.m.

Poplar/Dogwood

CONCURRENT SESSIONS — 8:00 to 9:00 a.m.

Pomodoro Room

4. The Enrollment Firm of the Future

Together we will discuss the evolving role of the "enrollment firm." Learn why employers are hiring them and how those reasons align with the distribution of voluntary benefits. Find out what services they provide that align with carriers' needs. Discover how they are using technology to make these services and enrollment easier and more effective. You will leave with a better understanding of what we can or should be doing to better align with their new models.

ERIC HELMAN, Chief Strategy Officer, Hodges Mace; **ANDREW JENNINGS**, President, Prepare Benefits; **WES MOSS**, Vice President of Sales, TBX Benefit Partners; *Moderator: MIKE ZILAHY*, Associate Director, Enrollment Experience, Sun Life

Cypress Room

5. The Players in Our Sandbox Are Changing!

In this workshop we will talk about who the new entrants/disruptors are to our "playground" and how they impact all of us who already play here. They are changing the way employers and employees think about benefits and how they are delivered. So how do we play nice and not fall behind? In this informative session, you will hear from the entities that are reshaping our market.

JOEL A. CARTER, Senior Vice President of Client Development, Secova; **MATT KAISER**, Vice President, Director of Human Resources Technology and Outsourcing, Lockton Companies; **PAUL SMITH**, Chief Revenue Officer, CodeBaby; *Moderator: MARIE LOUGHRAN*, Second Vice President, Workplace Solutions Sales & Service, Boston Mutual Life Insurance Company

Oak Room

6. Avatars? Decision Support Tools? What Does the Customer Experience Look Like?

Technology presents a new look and feel to the enrollment space. The panel will discuss how to engage the customer and provide them with valuable information at their fingertips.

- How consumers shop for their benefits
- Providing ongoing education to jump start the decision-making process
- Measuring the effectiveness of the technology and driving performance

SCOTT EVANS, Chief Operating Officer, benefitsCONNECT; **VINAY GIDWANEY**, Co-Founder, Chief Product Officer, Maxwell Health; **ALLISON LANDERS**, Vice President of Customer Experience, Prudential; *Moderator: JESSIE MYERS*, Senior Enrollment Manager, Assurity Life Insurance Company

REFRESHMENT BREAK — 9:00 to 9:15 a.m.

Poplar/Dogwood

WORKSHOPS ARE REPEATED — 9:15 to 10:15 a.m.

Pomodoro Room

4. The Enrollment Firm of the Future

Cypress Room

5. The Players in Our Sandbox Are Changing!

Oak Room

6. Avatars? Decision Support Tools? What Does the Customer Experience Look Like?

REFRESHMENT BREAK — 10:15 to 10:30 a.m.

Poplar/Dogwood

GENERAL SESSION 3 — 10:30 to 11:45 a.m.

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Birch/Willow

A Strategy, Business Partner and Application Program Interfaces All Walk Into a Bar...



MOHAN SUBRAMANIAM, D.B.A., M.B.A.

Associate Professor of Strategy,
Carroll School of Management
Boston College



AARON ROBY, Moderator
Vice President, Partner Enrollment &
Implementation Strategies Officer
Texas Life Insurance Company

As digitalization opens new opportunities for firms to leverage information, rather than physical assets, Application Program Interfaces are poised to replace alliances as the most common means for inter-firm partnerships. Learn about how APIs are different from traditional partnerships as well as:

- Scalability of operations
- Flexibility in acquiring new partners
- Fluidity in business goals

ADJOURNMENT — 11:45 a.m. to 12:00 noon

INAH CHAMBERS

Client Relationship Director & Staff Representative,
U.S. Client Services
LIMRA

THANK YOU TO OUR COMMITTEE MEMBERS

For their unselfish service and dedication
in crafting an outstanding program.

BRANDAN BRUCE, ING

DEBORAH DESMYTHER, The Hartford

MARIE LOUGHRAN, Boston Mutual

ALAN MARSHALL, Transamerica

JOE MITCHELL, Lincoln Financial Group

JESSIE MYERS, Assurity Life Insurance Company

STEVE PITZER, Humana

AARON ROBY, Texas Life

MICHAEL ZILAHY, Sun Life Financial

General Session Speaker Biographies

JOHN ERICKSON

*Vice President, Analytics & Research
Esurance*

John is responsible for developing enhancements to Esurance's auto insurance product lines. A 33-year veteran of the auto insurance business and a lifelong numbers cruncher, John has worked in a variety of actuarial and product management roles in the insurance industry. His interest in analytics has led him to measure and model many aspects of insurance products, with increasing focus on customer segmentation and the customer experience.

BILAL KAZMI

*Assistant Vice President, Analytics & Insights
Sun Life Financial*

Bilal has spent more than 10 years working for Sun Life Financial across multiple business lines and disciplines. His team uses data, design thinking, and research-driven insights to develop decision support tools rooted in business and customer needs. Before Sun Life, Bilal worked as a management consultant for A.T. Kearney, a management consulting firm. He earned a Bachelor's degree in Finance from Bentley University and a Master of Business Administration from Carnegie Mellon University's Tepper School of Business.

ANDREA SAVA STRA

*Director, Marketing Employer Group
The Hartford*

Andrea is responsible for developing, overseeing, and leading the execution of the Voluntary Benefits marketing strategy for The Hartford's Employee Benefits business targeting brokers, employers, and consumers. Her team's main goals are to engage and educate consumers on the need for life, disability, critical illness, and accident insurance. Andrea holds a patent on an educational technology tool and is currently working on a Master's degree in integrated marketing communications at Marist College. She received her Bachelor's degree in communication science from Eastern Connecticut State University.

DR. MOHAN SUBRAMANIAM

*Associate Professor of Strategy,
Carroll School of Management
Boston College*

Dr. Subramaniam has a doctorate in Management Policy from Boston University and an MBA from the Indian Institute of Management at Bangalore. He specializes in the areas of ecosystem strategy, global strategy, and the strategic management of knowledge and innovation. His research appears in several leading management journals. He teaches courses in strategy, global strategy, and innovation management at Boston College. Dr. Subramaniam has consulted with senior executives at leading global companies such as General Motors, Hamilton Sunstrand, Nextel, New Balance, Voestalpine, Tata Consulting Services, and has taught executive development programs at the University of Connecticut and at Boston College.

PATRICK TONER

*Founder
Customer Benefits Analytics*

Patrick founded Customer Benefits Analytics in 2014 to improve benefits marketing by using data analytics and digital marketing. He has 12 years of experience in employee benefits. As head of Cigna Voluntary's marketing and enrollment strategy, he led innovations including personalized enrollment kits, online decision support tools, online enrollment bundled with voluntary products, and customer segmentation. Prior to Cigna, Patrick led MetLife's e-business team that built the MyBenefits and MetLink online portals, and was head of digital strategy for SourceMedia, the parent company of Employee Benefits News and Employee Benefits Adviser. He has a B.A. from Vassar College and an M.B.A. from Columbia University. He lives in New Jersey.

JAMIE WALKER

*Vice President, Product and Consumer Engagement
Plan Source*

Jamie Walker is the Vice President of Product and Consumer Engagement. She is responsible for the company's product development vision, strategy and corresponding processes. She balances strategic collaboration with the company management team members, personnel and budget management, as well as hands-on day-to-day implementation for operational effectiveness. Prior to PlanSource, Jamie served as the Senior Director of Enterprise Data Strategy and Senior Director of Product & Innovation with UnitedHealth Group. Jamie is recognized as an innovative leader with respect to analytics and utilizing data to support and define strategic direction for product design and engagement. This thought leadership has yielded two patents for consumer engagement and the creation of products that have increased program participation, reduced spend and fostered documented improved health outcomes.

Antitrust Policy and Caution

Each person attending this function must be mindful of the constraints imposed by federal and state antitrust laws. The people here today represent companies that are in direct business competition with one another. LIMRA's purpose is to provide a forum for the free exchange of ideas on the designated topics of our meetings. It is not the purpose of these meetings to reach any agreement that could have anticompetitive effects.

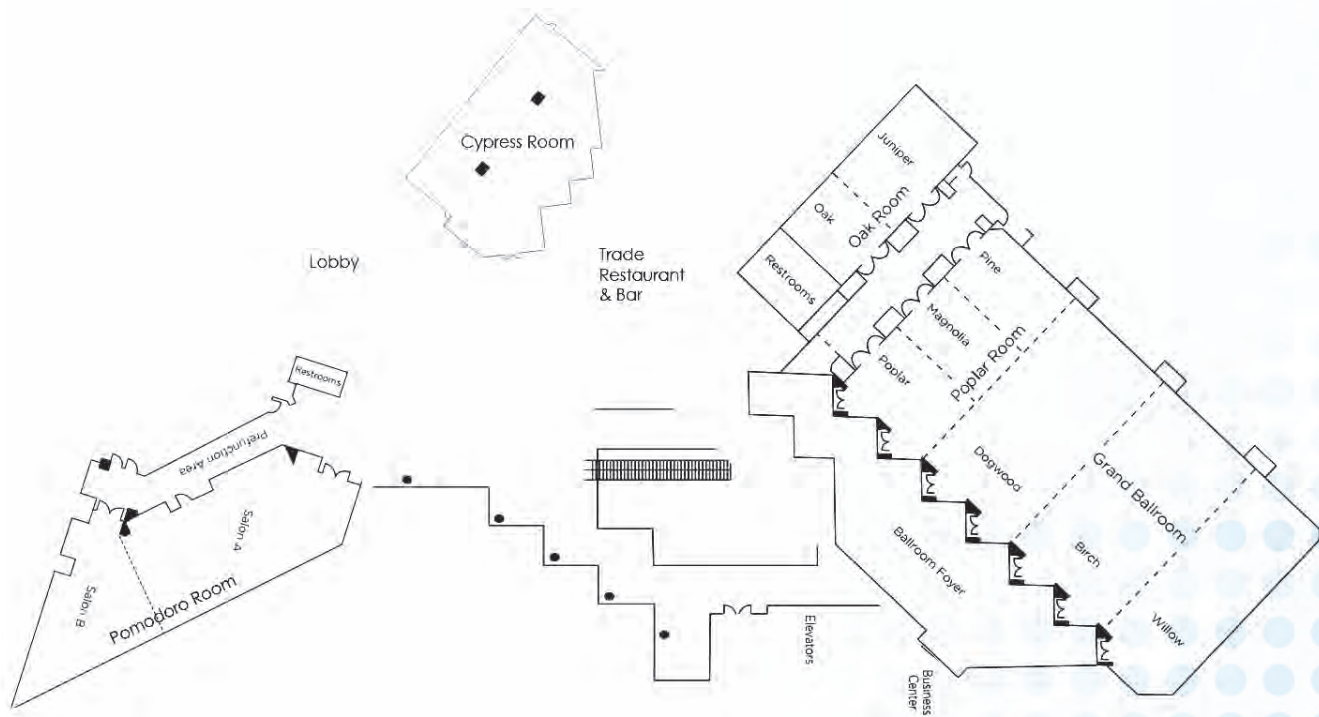
Individuals must keep in mind that a violation of the antitrust laws may subject them to substantial fines and a jail term. You can avoid problems by following simple guidelines:

- Stick to the published agenda.
- Pricing, premiums, benefits to be offered or terminated are competitively sensitive information which competitors should not exchange or discuss with each other. Never take a poll of views or make a collective agreement on these issues.
- Always retain your right to make an independent judgment on behalf of your company.

LIMRA is dedicated to the purpose of assisting all of its members to achieve their competitive potential.

Smoking is prohibited during all conference functions.

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