Enrollment Technology Strategy Seminar

Looking Beyond Tomorrow

2017

February 1–2

Loews Royal Pacific Resort, Orlando, FL

- Form stronger partnerships.
- Rethink employee engagement.
- Discover new technology.

LIMRA®

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Wednesday, February 1

REGISTRATION — *7:00 to 8:15 a.m.*

BREAKFAST/NETWORKING — *7:30 to 8:15 a.m.*

WELCOME REMARKS — *8:15 to 8:30 a.m.*

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

GENERAL SESSION 1 — *8:30 to 9:45 a.m.*

So Many Laws, So Little Time

Staying current with all the new technology in our business is hard. Staying current with all the laws is even harder. In this session, learn about:

- The many new e-commerce laws
- How to stay vigilant with people's sensitive data
- What UETA is

We'll discuss some of the current rules and regulations and how they may apply to online enrollments. We'll also hear from carriers and benefits administrators about who in the end is responsible for ensuring compliance.

MILES ARCHER, VP, Internal Audit, Unum; **PATRICIA BARNARD,** General Counsel, PlanSource; **JOSEPH VALDALEZ**, Director of Compliance, PlanSource; **PATRICIA WERN,** Manager, Compliance, Prudential; *Moderator:* **BRANDON COOK,** Director, Third Party Enrollment, Prudential

SPONSOR SHOWCASE 1 — *9:45 to 10:15 a.m.*

BREAK — *10:15 to 10:45 a.m.*

GENERAL SESSION 2 — *10:45 to 11:30 a.m.*

Technology: All the Latest for Success

There is *so much* technology available and new tech is coming out every day. These solutions can help with everything from benefits administration to payroll to compliance. But what are employers using for tech and what do they want?

- Who do employers think should provide the technology?
- What would motivate employers to switch platforms?
- Why do some employers choose not to use technology?

Come hear the results of new LIMRA research that explores these questions and so many more.

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

SPONSOR SHOWCASE 2 — *11:30 a.m. to 12:00 noon*

LUNCH — *12:00 noon to 1:00 p.m.*

CONCURRENT SESSIONS — *1:00 to 2:00 p.m.*

1. How to Choose the Right Tech Partner

In business, as in life, picking the right partner is paramount to your success and happiness. But how will you know it when you spot "the one?" In this workshop, you'll:

- Learn the dos and don'ts of engaging potential tech partners.
- Hear about strategies that promote growth.
- Know the importance of deploying a formal tech strategy and engagement process.

It's so important to know best practices for vetting and onboarding technology partners before making a commitment. This workshop will teach you what to look out for.

LYLE GRIFFIN, President, Selerix Systems; **DONNA B. MORGAN,** MBA, FLMI, HIA, ACS, SVP, Enrollment Technology Solutions, Allstate; **MISSY PORTH,** Director, Enrollment Integration, Aflac; *Moderator:* **STEPHEN PITZER,** FLMI, CSP, Director, Workplace Voluntary Benefits, Humana

2. Realigning for Better Results

There is so much to consider when working with third-parties. In this workshop, you'll see how some carriers are improving their bottom line with product and technology alignment.

- Learn how carriers are working with tech companies.
- Discover obstacles that are bound to crop up.
- Hear how to compete and expand in an uncontrollable environment.

You *can* realign processes, technology, and products for growth. We'll tell you what you need to know.

BRANDAN BRUCE, Director, Sales and Enrollment Technology, Voya; **DON GARLITZ,** Senior Vice President, Strategic Partnerships, bswift; *Moderator:* **JESSIE MYERS,** Senior Worksite Enrollment Manager, Assurity Life Insurance Company

3. The Biggest Challenges We Face

Benefits administration solutions are easier said than done. But there are best practices to be aware of. Come and hear from a carrier, a tech firm, and a broker to see how they made everything work for them:

- Discover optimal ways to set up, implement, and use an administration solution.
- Find out about some of the biggest potential pitfalls.
- See how your partnership can thrive in a competitive marketplace.

Even though there are some tough challenges, there is plenty of progress to be made now and into the future.

TOM DAVENPORT, AVP, Enrollment Technology, Transamerica Employee Benefits; **STEVE HERMAN,** Vice President, Web Benefits Design; **CINDI JOHNSTON,** Director of Group Benefits, Seaside Insurance, Inc.; *Moderator:* **MIKE ZILAHY,** Associate Director, Enrollment Experience, Sun Life Financial

BREAK — *2:00 to 2:15 p.m.*

WORKSHOPS ARE REPEATED — *2:15 to 3:15 p.m.*

1. How to Choose the Right Tech Partner

2. Realigning for Better Results

3. The Biggest Challenges We Face

BREAK — *3:15 to 3:30 p.m.*

SPONSOR SHOWCASE 3 — *3:30 to 4:00 p.m.*

GENERAL SESSION 3 — *4:00 to 5:00 p.m.*

Hot Topics Discussion

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LIMRA RECEPTION/DINNER — *6:00 to 9:00 p.m.*

Thursday, February 2

CONTINENTAL BREAKFAST — *7:15 to 8:00 a.m.*

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

4. Together in Perfect Harmony

There are lots of different roles in our business: employer, producer, enrollment partners, and more. It goes without saying that we all need to play nicely. This panel discussion will focus on the evolving role that HRIS platform providers play in creating and managing the experience.

- Have HRIS offerings changed much?
- What business and technology solutions work best?
- What are the biggest challenges and opportunities?

You'll also hear about success stories and things to watch out for.

AMIT AHLUWALIA, Vice President of Sales, Flock; **KEN LERNER,** Distribution Information, United Health Group; *Moderator:* **STEVE WYGONOWSKI,** Director, Strategy Delivery, The Hartford

5. Hello? Anybody?

Communication is a two-way street, but the path to the future is a single-lane highway. How we communicate benefits today will certainly be different tomorrow. Attend this session to:

- Get a crystal ball's look at benefits communications in the future.
- See how older communication methods are less effective than they were.
- Learn about what successful companies are doing.

Keep up with the Joneses — and see how you can communicate for outstanding results.

ERIKA GRACE, Director, Customer Experience, MassMutual; **VISHAL SIBAL,** Founder and CEO, Benefitcloud; **BRIAN SMITH,** Regional Director, Marketing, Farmington Company; *Moderator:* **ADAM KLUTSE,** Relationship Manager, MassMutual

6. The Tale of the Harmonious Relationship

Once upon a time, there was a carrier and an enrollment tech company. And they worked together beautifully and lived happily ever after. If this doesn't sound like your experience, attend this workshop to hear about what you can do differently.

- Learn the results from a survey given to carriers and enrollment tech companies.
- Discuss standardization of census formats, EDIs, and APIs.
- Ask others just like you what needs to be done to get on the same page.

Curious to know if carriers and enrollment technology companies can have a similar playbook? We'll fill you in.

KEVIN MCNAMARA, Senior Enrollment Strategist, The Standard; **TIM O'CONNOR,** AVP, Strategic Operations, Businessolver; **ROBERT PATERSON,** Chairman, Afinium; *Moderators:* **RACHEL GONZALES,** Sr. Associate, Partner Enrollment & Implementation Strategies, Texas Life Insurance Company; **JOHN HARWOOD,** Director of Enrollment Technology, Transamerica Employee Benefits

BREAK — *9:00 to 9:15 a.m.*

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

4: Together in Perfect Harmony

5: Hello? Anybody?

6: The Tale of the Harmonious Relationship

BREAK — *10:15 to 10:30 a.m.*

SPONSOR SHOWCASE 4 — *10:30 to 11:00 a.m.*

GENERAL SESSION 4 — *11:00 a.m. to 12:00 noon*

Don't Get Lost in the Paper Shuffle

Technology only helps when you implement it the right way. For example, e-signatures are quickly becoming standard operating procedure for onboarding and any form use. And there are lots of good reasons to use them. But what do customers want when it comes to e-signatures? Attend this general session to learn how you can:

- Use e-signatures for the best results with 100 percent compliance.
- Cut turnaround time by 90 percent.
- Keep your customers and partners satisfied.

Anyone who wants to improve performance, efficiency, and customer experience should attend this important session.

KEN GROHE, Senior VP & GM of Emerging Products, Barracuda; *Moderator:* **JOE MITCHELL,** AVP, Lincoln Financial

ADJOURNMENT — *12:00 noon*

INAH CHAMBERS
Client Relationship Director & Staff Representative,
U.S. Client Services
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For their unselfish service and dedication in crafting an outstanding program.

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