Enrollment Technology Strategy Seminar

February 6 – 7, 2018
Omni Jacksonville Hotel, Jacksonville, FL

Exploring
Opportunities
Together

- Discover the latest breakthroughs in enrollment technology
- Learn appropriate strategies for developing win-win relationships
- Rethink your enrollment technology and member engagement

LIMRA®
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2018 Enrollment Technology Strategy Seminar

TUESDAY, FEBRUARY 6

REGISTRATION — *7:00 to 8:00 a.m.*

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

WELCOME REMARKS — *8:00 to 8:15 a.m.*

INAH CHAMBERS
Client Relationship Director & Staff Representative,
Member Relations & Sales
LIMRA

GENERAL SESSION 1 — *8:15 to 9:15 a.m.*

API (Application Programming Interface) — The Future of Data Exchange

JANICE CHAUSSEE
Director, Product Development
ADP

HUARD SMITH
Vice President, Financial Services Practice Lead
Forrester

SRI TIPIRNENI
Director, Product Management
ADP

BRANDON COOK, *Moderator*
Director, Third Party Enrollment Platforms
Prudential

Hear from an industry leader on why and how they chose to use APIs to interact with carriers to look toward the future. The discussion will answer:

- What an API is and how it can interface with web, desktop, and mobile
- How to design a successful API strategy while addressing security concerns for enterprise applications
- What makes up the API economy

BREAK — *9:15 to 9:30 a.m.*

CONCURRENT SESSIONS — *9:30 to 10:30 a.m.*

Workshop 1: Ask the API Experts

Meet with a panel of API experts and insurance professionals to discuss the evolution of API. Panelists will discuss:

- How to make APIs customer-centric
- How APIs are positively and negatively affecting businesses today
- What lessons have been learned and what pitfalls to avoid

KELLIE BENSON-BRAY, Director, Strategic Partnerships, ADP; **WILLIAM GIACONIA,** Vice President, Benefits Administration, ADP; **HUARD SMITH,** Vice President, Financial Services Practice Lead, Forrester; *Moderator:* **ERIK FADLOVICH,** Senior Director, Enrollment Technologies, Trustmark Insurance Company

Workshop 2: Driving Successful Partnerships

Carrier and technology partnerships are critical to growth — especially in our industry. Each partnership relies on many factors for success and there is no one-size-fits-all solution. In this session, you will:

- Better understand when to develop a partnership versus maintaining a vendor relationship
- Hear how forming the right partnership during the onboarding process leads to key success factors
- Distinguish appropriate strategies for a direct partnership, exchange, and marketplace

CAROL ALTMAN, Director of External Partnerships, Group Benefits, The Hartford; **JEFF CALDWELL,** AVP – Employee Benefit Sales, Transamerica Corporation; **BEATA ROGALA,** Second Vice President, Enrollment & e-Business, Worksite Marketing, Guardian Life Insurance Company; *Moderator:* **TOM DAVENPORT,** AVP, Enrollment Technology, Transamerica Corporation

BREAK — *10:30 to 10:45 a.m.*

All workshops are repeated. All attendees will be assigned to a specific timeslot for each concurrent session and will be able to attend all workshops.

WORKSHOPS ARE REPEATED — *10:45 to 11:45 a.m.*

Workshop 1: Ask the API Experts

Workshop 2: Driving Successful Partnerships

LUNCH — *11:45 a.m. to 12:45 p.m.*

CONCURRENT SESSIONS — *12:45 to 1:45 p.m.*

Workshop 3: Creating the Best EDI Experience for Your Customer

EDI (Electronic Data Interchange) enables us to transfer data electronically without manual intervention and reduces paper! This panel of carrier and benefit technology firms will explore:

- Activities that will provide the customer the best EDI experience
- Implementation and maintenance of EDI
- Ways to support an employer that changes technology

MIKE COBBAN, Director of Operations and Support, SoftCare Solutions; **JOHN LIVENGOOD,** Partner Management Director, Colonial Life; **ASH ROFAIL,** CEO, eBenefits Network, LLC; *Moderator:* **JOE MITCHELL,** AVP – Enrollment Technology and Member Services, Lincoln Financial Group

Workshop 4: Benefits Technology in the Mobile World

Attend this session to learn how technology is moving toward mobile devices and brainstorm how benefits technology can adapt to these trends.

- How is mobile technology changing the face of decision support?
- What can employees expect from mobile access to their benefits?
- How can mobile responsive design and mobile apps be used to illustrate and enroll in benefits?

JOHN JONES, AVP – E-Business Corporate Marketing and Strategy, The Standard; **NANCY SANSOM,** Chief Marketing Officer, PlanSource; **DAVE WIENEKE,** Digital Consultant, Connective DX; *Moderator:* **BRYAN WELLS,** Enrollment Strategist, The Standard

BREAK — *1:45 to 2:00 p.m.*

WORKSHOPS ARE REPEATED — *2:00 to 3:00 p.m.*

Workshop 3: Creating the Best EDI Experience for Your Customer

Workshop 4: Benefits Technology in the Mobile World

BREAK — *3:00 to 3:15 p.m.*

CONCURRENT SESSIONS — *3:15 to 4:15 p.m.*

Workshop 5: Should You Adopt Intelligence Automation?

Intelligent automation is streamlining the process of quotation to claim management. Attend this session to learn:

- How carriers are using intelligent automation to improve relationship with brokers
- Receptivity of brokers to digital adoption
- How intelligent automation can be utilized to improve operational efficiency

COLIN BRADLEY, Vice President, Business Development, Winston Benefits; **THOMAS PLEWA,** Business Consultant, RPA, Assessment Lead, MassMutual; **JOHN ROE,** Managing Director, Accenture; *Moderator:* **ADAM KLUTSE,** Relationship Manager, MassMutual

Workshop 6: New Benefit Technology Solutions

Explore the latest benefit technology solutions and:

- Discuss how different solutions can solve challenges you or your broker are facing
- Discover which solutions are right for your specific needs
- Get an understanding of new shopping experiences for the consumer

GREG AUTUORI, CEBS, Director, Benefit Operations, Namely; **JOHN KELLY,** CEO & Founder, Nexben; **AMY PARKMAN,** Founder, Springboard Benefits; *Co-moderators:* **RACHEL GONZALES,** Sr. Associate, Partner Enrollment & Implementation Strategies, Texas Life Insurance Company; **ANDREW MOORE,** AVP, Benefits Technology, Lincoln Financial

BREAK — *4:15 to 4:30 p.m.*

WORKSHOPS ARE REPEATED — *4:30 to 5:30 p.m.*

Workshop 5: Should You Adopt Intelligence Automation?

Workshop 6: New Benefit Technology Solutions

GALLERY WALK RECEPTION — *6:00 to 7:30 p.m.*

During the reception, technology company sponsors will be conducting demonstrations. All attendees will have an opportunity to view all demonstrations.

DINNER — *7:30 to 9:00 p.m.*

WEDNESDAY, FEBRUARY 7

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

GENERAL SESSION 2 — *8:15 to 9:20 a.m.*

Cyber (In)Security — Impact of Recent New York State Intervention

DAN LESLIE, M.S., CISSP
Senior Director, Cyber Security Intelligence, Operations & Information Technology
Namely, Inc.

LISA McLAUGHLIN, CRCP
Corporate Information Security Officer
SS&C Technologies

CHRISTOPHER PETILLO
Attorney
Drinker Biddle & Reath, LLP

ANDREW MOORE, *Moderator*
AVP, Benefits Technology
Lincoln Financial Group

Experts answer burning questions on New York's new cyber security regulations:

- What is the law and how far reaching will it be?
- What other states are considering similar regulations?
- How are carriers preparing to comply?
- Key considerations for carriers preparing to comply

BREAK — *9:20 to 9:45 a.m.*

CONCURRENT SESSIONS — *9:45 to 10:45 a.m.*

Workshop 7: Building Your Enrollment Technology: Integration Versus Residential

This session will explore the pros and cons of third-party enrollment technology versus residential build enrollment technology, such as:

- Why and when to integrate or residentially build
- Determining the best solution for your specific business
- How to measure success
- The future of enrollment technology connections

JOHN CROWLEY, Chief Technology Officer, Employee Navigator; **NORMAN IRELAND,** Chief Product Officer, Benepay Technologies; **ASHLEY TIPTON,** Business Development Manager, EaseCentral; *Moderator:* **JOHN LIVENGOOD,** Partner Management Director, Colonial Life

Workshop 8: LIMRA Research Update

Attend this interactive, audience participation session as LIMRA staff shares information on the workplace benefits industry and the latest research findings. We will:

- Discuss industry trends
- Explore Employer Technology Strategies
- Share broker perspectives

INAH CHAMBERS, Client Relationship Director & Staff Representative, Member Relations & Sales, LIMRA; **ANITA POTTER,** Assistant Vice President, LIMRA; *Moderator:* **JESSIE EDMISTEN,** Sales/Enrollment Manager, Assurity Life Insurance Company

BREAK — *10:45 to 11:00 a.m.*

WORKSHOPS ARE REPEATED — *11:00 a.m. to 12 p.m.*

Workshop 7: Building Your Enrollment Technology: Integration Versus Residential

Workshop 8: LIMRA Research Update

ADJOURNMENT — *12:00 p.m.*

THANK YOU TO OUR COMMITTEE MEMBERS

BRANDON COOK, Prudential
TOM DAVENPORT, Transamerica
JESSIE EDMISTEN, Assurity Life
ERIK FADLOVICH, Trustmark Insurance
RACHEL GONZALES, Texas Life
ADAM KLUTSE, MassMutual
JOHN LIVENGOOD, Colonial Life
JOE MITCHELL, Lincoln Financial
ANDREW MOORE, Lincoln Financial Group
BRYAN WELLS, The Standard

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