The Marketing Conference

May 30 – June 1, 2018

Hyatt Regency Baltimore, Baltimore, MD

Reinventing the Journey

- Enhance engagement through digital initiatives
- Explore new and innovative marketing strategies
- Celebrate marketing achievement at the Creative Connections Award

LIMRA®

www.limra.com/marketingconf

Reinventing the Journey

Our industry is in the midst of a paradigm shift in how we connect with prospective buyers. Today's consumer expects the opportunity to shape the products they consume — while also demanding more personalized service.

Along with this change comes opportunities. Carriers have the opportunity to enhance and reinvent the journey as customers engage with their organizations, whether it be through a product, an online experience, a face-to-face interaction, or through a service.

LIMRA's 2018 Marketing Conference will offer strategic and practical insights in four key focus areas: digital initiatives, consumer insights, customer experience, and marketing strategy. You'll be inspired to reinvent the journey in every aspect — whether you're focused on the end customer, the field, your company's associates, or even your own personal development through this changing landscape.

General Session Highlights

Transformation Starts at Home

BRENT KORTE
Chief Marketing Officer
Ameritas

More than ever marketing organizations are taking on the responsibility to help companies innovate. Often, that requires transformation of capabilities within their organizations. From the digital imperative to mining deep insights and analytics, marketing teams are working very hard through the change curve that is affecting our industry. However, what often gets overlooked are the associates and imbedded culture within the company that might struggle with change and innovation. Where do you start? You start at home, with a strong focus on your culture and your associates. Educating them on the "why" and then moving to the "how" for innovation and transformation.

Would You Do That to Your Mother?

How Would Your Company Act if Every Customer Were Your Mom?

JEANNE BLISS
Founder and President, CustomerBliss
Co-Founder, The Customer Experience Professionals Association

This simple litmus test helps pinpoint the causes of customer unrest. Customers crave the same gentle treatment, simple directions, and honorable behavior that our mothers demanded of us. By taking a minute to pause, review, and consider your actions through the "Mom lens," you give yourself a powerful tool to think differently about your approach to customer experience, whether that's your company's return policy, its social media presence, its big picture Cx strategy, or its frontline customer service.
By converting 'frustrated Mom moments' into 'make Mom proud' moments, and exploring some of the companies who defy regular business practices to build bonds with employees and customers, this inspirational session will challenge your thinking and prompt you to re-evaluate your own Cx practices, focusing on key areas such as enabling employees to deliver value, being a joy to do business with, designing experiences to enable customers to achieve their goals, and establishing customer trust.

The Power of Purposeful Storytelling

MICHEL NERAY
Author, Master Practitioner
Neuro-Linguistic Programming (NLP)

It is well-established that stories are more memorable and powerful than facts and statistics. Stories are the basis of leadership, coaching, influence, teaching, sales, and team culture. From the beginning of time, stories are how we have passed on our values, made sense of the world, and effected change. Today, it's how we influence our customers, our teams, and audiences. Combining exercises in NLP (Neuro-Linguistic Programming), classic storytelling, stand-up comedy, improv, acting, and professional speaking, Michel will help you strategically develop signature and turning-point stories to motivate, inspire, and influence team members, customers, and audiences in the most engaging and powerful way. He will include case studies, testimonials, and conversational stories to support sales and brand positioning.

Beyond Digital: Competing in an Automated World

DEBRA JASPER, Ph.D.
Founder and Chief Executive Officer
Mindset Digital

Mobile, custom, fast, and easy. That's what it takes to meet the demands of today's digital consumer. But recognizing this isn't nearly enough. This fast-moving session examines the:

- New customer journey
- Impact of AI, charming chatbots, and virtual assistants (think Lemonade, Crystal, and GrapeVine6)
- Rise of digital lending (Underwrite AI, alternative data, predictive analytics)
- Shift to an every touchpoint matters culture

To survive, legacy industries such as insurance must adapt — fast. We'll connects the dots, illustrating how new technologies and automation are driving customer expectations and innovation.

Continuing the Journey: The Evolution and Elevation of Marketing

SEAN F. O'DONNELL
Vice President,
Member Relations & Consulting
LIMRA

Heighten your awareness and reinvent your thinking around marketing's role in this changing customer centric environment. Learn how to evolve from a Marketing department to a powerful discipline leading strategy and innovation across companies. Roll up your sleeves with LIMRA's Vice President, Sean O'Donnell, and your peers as you uncover new perspectives that may be the game changer you are looking for.

THE Creative Connections AWARD

Join us at lunch — Thursday, May 31

Platinum, Gold, Silver, and Bronze winners of the LIMRA Creative Connections Award will be announced during this special awards ceremony. This award recognizes and rewards marketing and creative excellence, innovation and achievement, and highlights best practices in financial services marketing.

Program Overview

Wednesday, May 30

FIRST-TIMERS' ORIENTATION — *1:30 to 2:00 p.m.*

First-time attendees are invited to attend this orientation to get a better understanding of the conference tracks and sessions. Our committee chairs will offer guidance for choosing the best schedule to meet your personal objectives. We'll have small groups so you can meet and ask questions of conference planning committee members, have a snack, and learn how to stack the deck for raffle prize winning!

MEET AND GREET — *2:00 to 2:30 p.m.*

Join us as the conference begins to meet and greet peers while you share ideas and common experiences.

GENERAL SESSION — *2:30 to 3:30 p.m.*

Transformation Starts at Home

BRENT KORTE
Chief Marketing Officer
Ameritas

REFRESHMENT BREAK — *3:30 to 4:00 p.m.*

CONCURRENT WORKSHOPS — *4:00 to 5:00 p.m.*

LIMRA WELCOME RECEPTION — *5:30 to 6:30 p.m.*

Thursday, May 31

BREAKFAST — *7:00 to 8:00 a.m.*

GENERAL SESSION — *8:00 to 9:00 a.m.*

Would You Do That to Your Mother?
How Would Your Company Act if Every Customer Were Your Mom?

JEANNE BLISS
Founder and President, CustomerBliss
Co-Founder, The Customer Experience Professionals Association

BREAK — *9:00 to 9:30 a.m.*
Sponsored by EverQuote

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

BREAK — *10:30 to 10:45 a.m.*

CONCURRENT WORKSHOPS — *10:45 to 11:45 a.m.*

LUNCHEON & CREATIVE CONNECTIONS AWARD — *11:45 a.m. to 1:00 p.m.*

BREAK — *1:00 to 1:15 p.m.*

CONCURRENT WORKSHOPS — *1:15 to 2:15 p.m.*

REFRESHMENT BREAK — *2:15 to 2:30 p.m.*

CONCURRENT WORKSHOPS — *2:30 to 3:30 p.m.*

REFRESHMENT BREAK — *3:30 to 4:00 p.m.*

GENERAL SESSION — *4:00 to 5:00 p.m.*

The Power of Purposeful Storytelling

MICHEL NERAY
Author, Master Practitioner
Neuro-Linguistic Programming (NLP)

Friday, June 1

BREAKFAST — *7:30 to 8:30 a.m.*

GENERAL SESSION — *8:30 to 9:30 a.m.*

Beyond Digital: Competing in an Automated World

DEBRA JASPER, Ph.D.
Founder and Chief Executive Officer
Mindset Digital

BREAK AND EXHIBITOR RAFFLE — *9:30 to 10:00 a.m.*

GENERAL SESSION — *10:00 to 11:30 a.m.*

Continuing the Journey: The Evolution and Elevation of Marketing

SEAN F. O'DONNELL
Vice President, Member Relations & Consulting
LIMRA

ADJOURNMENT — *11:30 a.m.*

WORKSHOPS AT A GLANCE

Please use this as a reference to select one workshop from each time period.

	#	Session Title	Digital Initiatives	Customer Experience	Marketing Strategy	Consumer Insights
WEDNESDAY MAY 30						
4:00 to 5:00 p.m.	1.	Using Emerging Technology to Enhance the Consumer Experience	◆			
	2.	Send in the Anthropologist! Advisory Research for Impact			◆	◆
	3.	Stop Confusing Me: Keep It Simple With Content Strategy and Plain Language				◆
	4.	Financial Wellness Matters		◆	◆	
THURSDAY MAY 31						
9:30 to 10:30 a.m.	5.	Harness the Power of Facebook Advertising!	◆		◆	
	6.	The Secrets to Leading an Effective Marketing Team			◆	
	7.	Managing Customer Experience — It's Not Just About the Numbers		◆		◆
	8.	Using Data to Create Relationships and Drive Marketing		◆	◆	
10:45 to 11:45 a.m.	9.	Innovation Station — Part 1: Igniting Innovation With Design Thinking			◆	
	10.	Digital Breadcrumbs: Storytelling That Connects and Converts Across Platforms	◆		◆	◆
	11.	Big Data Meets Shotguns and Pickups				◆
1:15 to 2:15 p.m.	12.	Innovation Station — Part 2: Insights Into the Transformative Journey	◆	◆		
	13.	Social Data Insight: Meaningful Metrics to Get More for Your Money			◆	◆
	14.	Reinventing Illustrations to Improve Customer Experience		◆		
2:30 to 3:30 p.m.	15.	Personal, Memorable, Unique Experiences — Storytelling's Place in Finance		◆	◆	◆
	16.	SEO in 2018 — Top 8 Traditional and Trending Tactics	◆			
	17.	Navigating the Journey to Become a Social Business	◆		◆	
	18.	Future of Distribution and Its Impact on Marketing		◆		◆

Concurrent Workshops

Wednesday, May 30

4:00 to 5:00 p.m.

1. Using Emerging Technology to Enhance the Consumer Experience

The customer journey is evolving through emerging technologies in areas such as the Internet of Things and Artificial Intelligence. We'll learn how advisors and marketers can use some of these new tools to simplify and personalize interactions, resulting in increased engagement and a more meaningful and positive experience with your company.

JUSTINE LYNCH, Digital Development Manager, American National; ***Moderator:*** **KATIE PIRETTI,** Director, Digital Development, American National

2. Send in the Anthropologist! Advisory Research for Impact

In the midst of FinTech innovations in financial advice, the interpersonal work of financial advisors and why many customers still seek it out has sometimes been neglected. Anthropological research with financial advisors can offer insights that correct this.

- Learn what in-depth qualitative research of financial advice can offer.
- Learn about the tools and techniques used in such research.
- Learn about when this research is most useful, and how to deploy it.

BEHZAD SARMADI, Ph.D., Resident Anthropologist, Great-West Life; ***Moderator:*** **RITA LEPORE,** Senior Client Analytic Specialist, Great-West Life, London Life, Canada Life

3. Stop Confusing Me: Keep It Simple With Content Strategy and Plain Language

In today's always-on, always-distracted digital world, we struggle to reach our customers. And when we do, we're speaking to them using language driven by internal policies and politics. And customers just don't understand. In this session, we'll look at examples of plain language transformation and find out how to more effectively communicate with our customers. Attend this session, and you'll be able to:

- Look at your content from the perspective of your customer.
- Understand how plain language fits into your content strategy.

Get people in your organization aligned around creating content that's right for your customers.

JEFFREY GREER, Ph.D., Associate Director, Content Strategy, MRM/McCann Detroit, Vice Chair, The Center for Plain Language; ***Moderator:*** **VIVIAN ELBA,** Senior Marketing Manager, The Hartford

4. Financial Wellness Matters

When you Google financial wellness you receive 3,220,000 results in 0.47 seconds. Are you trying to figure this out too?

- In corporate America what does financial wellness really mean and what do we do about it?
- Get a holistic perspective from MetLife and Voya.

Ask the experts to see what is right for your organization and what you can do.

DAVID FLORES, Vice President, Sales and Marketing, MoneyStepsPFT; **JOHN STEBER,** Vice President, Customer Solutions, Voya Financial; **JOHN TULLOCH,** Vice President and Head of PlanSmart, MetLife; ***Moderator:*** **ANN FREEMAN,** Executive Director, Marketing, Trustmark

THURSDAY, MAY 31

9:30 to 10:30 a.m.

5. Harness the Power of Facebook Advertising!

Most advisors have embraced LinkedIn. However, advisors and corporate advertisers can up their social gains with a Facebook business page, a modest budget, and a thoughtful Facebook ad strategy. Learn from an interactive agency pro:

- Why Facebook advertising matters.
- What to promote and how much to spend.
- Who to target and how to reach prospects and clients on social.
- How to measure the results.

RYAN HURLEY, Director of Media and Analytics, The Archer Group; ***Moderator:*** **ROBERT BONSALL,** Head of Social Media, Penn Mutual

6. The Secrets to Leading an Effective Marketing Team

As the millennial wave continues to grow in the workforce, now more than ever, employee engagement is a hot topic. Marketing team effectiveness is especially impacted by employee engagement because of the fast-paced, ever-evolving marketing landscape.

- Discover how to get the most from your marketing team and keep them engaged along the way.
- Learn actionable ways to keep your team motivated in a fast-paced environment.
- Understand what drives the different generations in the workplace and how to promote a team-work mentality.

KATIE BARTLING, Associate Vice President, Marketing Communications, Sammons Financial Group Member Companies; **JODI BEEHLER,** Human Resources Consultant, Organizational Development, Sammons Financial Group Member Companies; ***Moderator:*** **MELISSA YORK,** Senior Marketing Specialist, The Standard

7. Managing Customer Experience — It's Not Just About the Numbers!

As efforts to become more customer-centric continue to mature, there is much interest in understanding how to actually manage the customer experience (Cx). This is particularly true when it comes to the insurance industry where historically there have been onerous processes for obtaining the product and limited engagement through the product lifecycle.

- Learn about recent LIMRA research focused on how companies are addressing customer experience.
- Find out how Western & Southern Life introduced a Cx measurement approach to their organization.
- Hear about the evaluation process, successes, the brutal facts, and how measuring customer experience is more than focusing on the numbers.

SYBIL COVELL, Director, Client Experience and Retention, Western & Southern Life; ***Moderator:*** **TODD SILVERHART, Ph.D., LLIF,** Director, Insurance Research, LIMRA

8. Using Data to Create Relationships and Drive Marketing

The landscape for marketing life insurance has changed rapidly. We all know this. Potential consumers are embracing technology, challenging brokers to adapt and forcing us to rethink how to reach the un- and underinsured. In this talk, we will give you a window into how we've approached solving this problem — through data collection, analysis, and the application of those insights. Learn how data has helped us build brand loyalty, an engaged user base, and a space where we can connect personally with our customers.

MUNIR PATHAK, Senior Data Scientist, Life.io; **JOHN WILSON, FLMI, AIRC, ACS,** Director, UCONN Center for the Advancement of Business Analytics (CABA); ***Moderator:*** **NATALIE BARENTHIN, GBDS,** Senior Marketing Research Analyst, Anthem Life

10:45 to 11:45 a.m.

9. Innovation Station — Part 1: Igniting Innovation With Design Thinking

Hear about Guardian's innovative journey, including how they generated numerous ideas, but were not quick to bring them to market. Today, Guardian is using design thinking to quickly innovate, prototype, test, and launch new ideas. In this interactive session, you will participate in a design thinking exercise, during which you will share and hear experiences from your peers.

AIMEE BERNARDO, Director, Strategic Innovation, Guardian Life Insurance Company; **SRAVAN MUTHIRAJ,** Head of Design Thinking, Guardian Life Insurance Company; ***Moderator:*** **ANGELA MEEHAN, CLU, ChFC,** Vice President, Corporate Marketing, Ohio National Financial Services

10. Digital Breadcrumbs: Storytelling That Connects and Converts Across Platforms

One of the hardest parts about marketing is getting people to pay attention. Particularly with all the digital channels, you write copy for landing pages, you pump out videos, and you're telling stories all over social media. Yet, you're not entirely sure who's listening. Imagine if you could create content that generated enough loyalty for your customers to follow you anywhere...including across platforms. Come prepared to discuss your company's story.

JOHN SISSION, President, HBT Marketing; ***Moderator:*** **MATHEW NELSON,** Marketing Consultant, MassMutual

11. Big Data Meets Shotguns and Pickups

For years, segmenting your market audience into discernable groups has been a tried and true marketing strategy. Further, in VOC surveys it's possible to identify and profile those customers who are more and less satisfied. However, in today's budget conscious environment, is that good enough? What if you could take customer groups and sub-segment them into even smaller, more distinct groups based on needs, attitudes, satisfaction levels, etc.? With big data tools, you can.

MICHAEL PATTERSON, Ph.D., Director of Research Analytics, Radius Global Market Research; **GLENN STAADA,** Senior Vice President, Radius Global Market Research; ***Moderator:*** **STEVEN WENDORF,** Director of Marketing, Catholic United Financial

1:15 to 2:15 p.m.

12. Innovation Station — Part 2: Insights Into the Transformative Journey

Discover how Haven Life, an innovator in providing term life insurance simply and easily online, evolved from quick start-up to a scalable provider that's capturing interest across the industry! Gautam Kumar, Assistant Vice President, Product Management with Haven Life will share insights and best practices from his experiences at Haven and other large financial service enterprises on how to make innovation and transformation a reality through strategic clarity, precise yet nimble execution, and an incessant focus on building the critical mass necessary to earn or unlock the next stage of the life-cycle.

GAUTAM KUMAR, Assistant Vice President, Product Management, Haven Life; ***Moderator:*** **LAURA HAHN,** Director, Customer Insight and Engagement, Guardian Life

13. Social Data Insight: Meaningful Metrics to Get More for Your Money

Social platforms are ubiquitous and the marketing spend has never been higher. How do you wade through the mountains of unending data and connect everything? How can you construct meaningful metrics to get more for your money? Learn how to use the ready-made tools at your disposal and other techniques to make your metrics bottom-line positive. This session will help you:

- Communicate the appropriate metrics to management.
- Move beyond vanity metrics.
- Pay attention to metrics that are actionable.
- Leverage competitor data to improve your results.

KARA BURNEY, Senior Director of Marketing, TrackMaven; ***Moderator:*** **JANET HOLTON,** Marketing Associate, Modern Woodmen of America

14. Reinventing Illustrations to Improve Customer Experience

This session will share how marketing can help make illustrations more appealing to clients. We will review several competitors' illustrations that have started to make their illustrations more user-friendly, eye appealing, and in some cases a replacment for marketing materials. We will also show some software companies that are helping create illustrations to track metrics, create follow-ups, and even forecast sales.

PATRICK HARPER, CLU, ChFC, FLMI, ACS, Director, Product and Concept Marketing, Penn Mutual; **KRISTA STEVENS,** Sales Development Strategist, Ameritas Life; ***Moderator:*** **MELISSA YORK,** Senior Marketing Specialist, The Standard

2:30 to 3:30 p.m.

15. Personal, Memorable, Unique Experiences — Storytelling's Place in Finance

How can building a compelling and memorable story shape marketing strategy that drives business results?

- Understand the importance of storytelling and its impact on decision-making.
- Learn how storytelling has proven effective across industries to drive differentiation, profitability, and sales.
- Find out why emotional storytelling is critical for your marketing strategy and brand identity.
- Hear real-world case studies and testimonials from your peers during the interactive session.

DAVID SHERIDAN, Vice President, Managing Director, Brokerage Distribution Protective Life; ***Co-moderators:*** **KATIE BARTLING,** Associate Vice President, Marketing Communications, Sammons Financial Group Member Companies; **ASHWIN KUMAR,** Senior Consultant, Annuity Marketing, Nationwide; **MICHELLE WOODS,** Vice President, Life Marketing, Protective Life

16. SEO in 2018 — Top 8 Traditional and Trending Tactics

2018 will be an interesting and exciting year for SEO. As search engines, technologies, and the customer journey are constantly changing, SEO continues to evolve. To help stay ahead of the game in 2018 we'll dive into the top traditional SEO techniques that are still effective, and look at the most prominent trends that are gaining momentum. You'll leave this session knowing key elements specific to the insurance industry that can help deliver maximum SEO success in today's ever-changing environment.

AMANDA OCHOA, Digital Advertising Specialist, American National; ***Moderator:*** **JANET HOLTON,** Marketing Manager, Modern Woodmen of America

17. Navigating the Journey to Become a Social Business

Disruptive technologies and changing customer demands are driving fundamental transformation of the insurance industry. While social media is just one driver of this change, it's an important one. So how is the industry responding? Join financial social media expert and bestselling author, Amy McIlwain, as she delivers the results of Hootsuite's global research, which surveyed over 300 financial services professionals with responsibility for social media strategy. In addition, she will chat with Rob Bonsall, the head of social media at Penn Mutual, to discuss the evolution of their field social media program. In this session, you can expect to hear:

- Best practices from global peers on leveraging social media to drive revenue
- How peers are implementing social strategies in a highly regulated, mature industry
- Actionable steps to use social media to unify your client's journey from prospect to customer to advocate
- How Penn Mutual utilizes social media across multiple teams

AMY MCILWAIN, Global Industry Principal, Hootsuite; ***Moderator:*** **ROBERT BONSALL,** Head of Social Media, Penn Mutual Life

18. Future of Distribution and Its Impact on Marketing

In this session, we will discuss the evolution of distribution and the impact it will have on marketers. There are many changes in today's marketplace that could affect the way companies sell products. Technology and regulation are two of the main driving forces as well as the empowered consumer. Leveraging new research conducted by LIMRA and EY, this session will explore key trends happening across the distribution landscape and how some companies are taking steps to thrive with the change. Come to this session to explore the link between marketing and distribution, and learn how marketers should be thinking futuristically in their go-to-market strategies.

PATRICK LEARY, LLIF, Corporate Vice President, Distribution Research, LIMRA, ***Co-Moderators:*** **MATHEW NELSON,** Marketing Consultant, Client Marketing, MassMutual; **KRISTA STEVENS,** Sales Development Strategist, Ameritas Life

Conference Details

TO REGISTER

Register online www.limra.com/marketingconf/

REGISTRATION FEES

Early-Bird Rates: Before May 1, 2018
LIMRA member — $1,250
LOMA (but not LIMRA) member — $1,875
Nonmember — $2,500

Standard Rates: After May 1, 2018
Member — $1,450
LOMA (but not LIMRA) member — $2,175
Nonmember — $2,900

LIMRA requires prepayment of registration fees prior to all conferences and meetings. Please make checks payable to LIMRA in U.S. dollars drawn on a bank in the United States. For Vendor registration fees, call Events Registration at 800-235-4672 (U.S. and Canada) or 860-285-7789.

SPOUSES/GUESTS: A registration fee of $100 is available to spouses and guests of registered attendees. Individuals in an industry-related position, co-workers, or associates do not qualify. We invite spouses/guests to participate in the event's food and social functions and ask that they wear their badge to these events. Participation in the general sessions and workshops is limited to those who have paid the full registration fee to attend the conference.

MEETING ATTIRE: The attire for all functions of this conference is business casual.

HOTEL INFORMATION

Hyatt Regency Baltimore
300 Light Street
Baltimore, MD 21202
Phone/Reservations: (800) 233-1234

Make your reservations by May 1, 2018 to receive the group rate of $219 single/double (plus applicable sales taxes). Requests after May 1 will be accepted based on space availability. The group guest room rate will be offered 3 days prior and 3 days after the meeting dates subject to availability. Please note that hotel rates will go up after the cut-off date or when the meeting room block sells out, whichever comes first. Make your reservations early to be able to take advantage of our discounted rates.

Check-in time is: 4:00 p.m./check-out time is 12:00 p.m.

CONTINUING EDUCATION CREDITS

LIMRA, in conjunction with the Society of Financial Service Professionals, is pleased to inform you that attendance at any of the workshop sessions will qualify interested individuals for one **Professional Recertification Program (formerly PACE) Credits.** A form will be available for your records to qualify for **CLU and ChFC continuing education requirements only.** If you have any questions or need more information about the **PRP program,** please visit: http://www.theamericancollege.edu/ce-continuing-education/pace or call The American College of Financial Services (888) 263-7265.

The Marketing Conference Committee

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