

**2021 LIMRA and LOMA Canada Virtual Annual Conference**  
**May 19 – 20, 2021**

**AGENDA**

**WEDNESDAY, MAY 19**

**10:00 – 10:15 am      Conference Opening Remarks**

*Brent Lemanski*

*Assistant Vice-President and Executive Director, LIMRA and LOMA Canada*

**10:15 – 11:00 am      New Directions, New Possibilities**

*John Carroll*

*Head of Member Relations and Sales – Insurance, U.S. and Canada, LIMRA and LOMA*

2020 unleashed crises that no one could have ever imagined and forced the industry to pivot quickly to a new way of working. A year later, we're still trying to figure out and adapt to a new normal. But what are the key business changes that are emerging from the pandemic? How have customer experiences and expectations shifted? Where's our industry headed and what opportunities will be created from this challenging time? Carroll will draw upon LIMRA's wide-ranging global research and resources, as well as his own deep industry insights, to address these issues and help you better understand — and prepare for — what lies ahead.

**11:00 – 11:45 am      Helping Advisors Build Better Businesses to Serve More Canadians**

*Hugh Moncrieff*

*Executive Vice-President, Advisory Network and Industry Affairs, Canada Life*

With Canadians living longer and needing to make financial decisions in a sea of overwhelming information, advice has never been more valuable. Canada Life is evolving its partnership with advisors to make a bigger impact on their business, so they can make a bigger impact on the financial, physical and mental well-being of Canadians. Moncrieff will speak to how his company helps advisors build better businesses and serve more Canadians.

**11:45 – 12:30 pm      How to Prosper in the New Norm (Hint: It's paved with addressing your customers' experience)**

*Alex Watson*

*Managing Principal and Co-Lead, Insurance Practice – Canada, Capco*

Success in the New Norm starts with addressing your customers' experience (CX) through a re-imagining of their needs and wants. The last decade focused investments in CX through a Digital Glass of point-in-time interactions to the benefit of the insurer. Now is the time to be visionary, creating end-to-end experiences to the benefit of those we serve. Watson will discuss his market observations and point-of-view on what insurers can do to fit in the New Norm.

**12:30 – 12:35 pm      Day 1 Closing Remarks**

*Brent Lemanski*

*Assistant Vice-President and Executive Director, LIMRA and LOMA Canada*

**THURSDAY, MAY 20**

**10:00 – 10:15 am**      **Day 2 Opening Remarks**

*Brent Lemanski*

*Assistant Vice-President and Executive Director, LIMRA and LOMA Canada*

**10:15 – 11:00 am**      **Digital Transformation Revolutionizes Operational and Financial Management**

*Carl Capato*

*Senior Vice-President, Risk Management Strategic Technology Partnerships, FastTrack*

Intelligent digital transformation technologies and automation are rapidly being utilized by life and disability insurers to proactively and objectively manage claims liability and improve customer experiences. Capato will discuss how digital transformation technologies — such as intelligent online portal, digital barcoding, robotic process automation, intelligent character reading, and automated business rules engine — are significantly improving carriers' operational efficiencies, bottom line and disabled life reserves.

**11:00 – 11:45 am**      **Optimizing Your CX Strategy and Technology to Create Opportunities**

*Ray Adamson*

*Vice-President, Insurance Solutions – Canada, Equisoft*

In insurance distribution, “customer” applies to several audiences: distributor, advisor and consumer. Exceeding their differing expectations at each step of the customer journey requires a strategic approach to digital transformation — one that is focused on a thorough understanding of the experiences these stakeholders have every time they interact with your organization, and built on identifying clear customer experience goals, crafting the right processes and implementing the best technologies. Adamson will explore the go-to-market strategies, value propositions, and technologies that create superior experiences for each type of stakeholder and new opportunities for growth.

**11:45 – 12:30 pm**      **TBD — Manulife**

**12:30 – 12:35 pm**      **Conference Closing Remarks and Adjournment**

*Brent Lemanski*

*Assistant Vice-President and Executive Director, LIMRA and LOMA Canada*