

# 2015 Big Data Analytics Conference

JUNE 24 – 26, 2015 • SEAPORT HOTEL & WORLD TRADE CENTER • BOSTON, MA



## *Getting to the Next Level*

- Customize your conference experience to suit your interests and learning style
- Enhance your knowledge with relevant content regardless of the level of your analytics program
- Network with experts and peers, including small group interactive sessions



[www.limra.com/bigdataconf](http://www.limra.com/bigdataconf)

# 2015 BIG DATA ANALYTICS CONFERENCE

## *Getting to the Next Level*

Welcome to LIMRA's second annual Big Data Analytics Conference! Big data is an active frontier for innovation. Big data and analytics offer substantial opportunities for companies to better inform actions and predict outcomes. The benefits of big data and analytics extend to every level of insurance and financial services companies.

LIMRA has taken this conference to the next level by offering innovative program content. We offer scheduled educational and informative sessions, but we have left room for you to, in real time, help create sessions as well. By adopting this approach, you have the opportunity to design and participate in highly interactive structured networking events, micro summits, and participant-driven sessions that will focus on shared learning, experiences and problem solving.

This conference focuses on helping attendees bridge the gap between big data and better decisions. At this conference, you'll learn about putting big data to work and delivering strategic value through developing business solutions using analytics. We are pleased that you have joined us to gather insight, value, and ROI for your organization.

# general session highlights

## Finding the Future Within Big Data



**TAMARA GAFFNEY**

Principal Analyst, Adobe Digital Index  
Adobe Systems Incorporated

Through the lens of trillions of interactions on social media, websites, search and mobile, the future is clear for those who know how to find meaning in big data. This talk will provide an entertaining and informative look into our future and will encourage the audience to think about big data from new points of view with an eye towards improving the strategic value of data within your organization.

## Big Data, Human Intelligence



**DAVID SILVERSTEIN**

President and CEO  
BMGI

As the description of the event suggests, learning to better utilize analytics is the goal. It's 2015 and talk of Big Data, Advanced Analytics, and Business Intelligence is no longer new. Billions have been invested, enabling more data to be collected in the last five years than during the prior 4.5 billion combined. But something's missing. For all of the investment in technology, for all the data miners, visualization experts, and data scientists who have been educated and hired...something's still missing. That something is *Human Intelligence*.

Drawing from his *Connect the Dots* Series of books, David Silverstein will talk about why real competitive advantage in the era of Big Data still comes down to people and their ability to think creatively about what to look for in data, what hypotheses to test, and what experiments to run. There's a misperception running rampant in the industry which suggests that with the right tools, patterns will "emerge" from the data. While sometimes they do, the real value comes from combining the power of Big Data Analytics with the power of Big Thinking. In this talk, Silverstein will combine his insights across multiple domains including innovation, data analytics, and strategy to connect the dots for attendees and show how Big Data and Human Intelligence are inextricably linked.

## Taking the Conference to the Next Level

During the first day of the conference, attendees will have the chance to share what they've learned and suggest topics they'd like covered the following day. Attendees will also vote to decide the three presentation topics Eric Siegel will cover in his closing keynote address.

## Keynote Presentation

### Predictive Analytics in *Your World*



**ERIC SIEGEL, Ph.D.**

Founder  
Predictive Analytics World and  
Text Analytics World

Predictive analytics is applicable throughout the enterprise. In this keynote session, *Predictive Analytics* author and Predictive Analytics World founder Eric Siegel will explore three of the following five topics to help take your analytics program to the next level. It's your conference, so attendees will vote on which three Dr. Siegel will discuss.

- Using Predictive Analytics for Marketing
- Lowering Costs with Predictive Analytics
- Various Ways Predictive Analytics Applies to Insurance
- Leveraging Social Media with Predictive Analytics
- Convincing Colleagues and Management to Deploy a Predictive Model

# program overview

## Wednesday, June 24

**SEMINAR & CONFERENCE REGISTRATION**  
— 10:00 A.M. to 5:00 P.M.

**SEMINAR ATTENDEES LUNCH** — 12:00 to 1:00 P.M.

**APPLIED ANALYTICS EXPERIENCE SEMINAR**  
— 1:00 to 5:00 P.M.

**OPENING RECEPTION** — 5:30 to 6:30 P.M.

## Thursday, June 25

**REGISTRATION** — 7:00 A.M. to 5:00 P.M.

**CONTINENTAL BREAKFAST** — 7:00 to 8:00 A.M.

**GENERAL SESSION** — 8:00 to 9:15 A.M.

### **Finding the Future Within Big Data**

**TAMARA GAFFNEY**

Principal Analyst, Adobe Digital Index  
Adobe Systems Incorporated

### **Big Data, Human Intelligence**

**DAVID SILVERSTEIN**

President and CEO  
BMGI

**BREAK** — 9:15 to 9:30 A.M.

**CONCURRENT SESSIONS & MICRO SUMMITS**  
— 9:30 to 10:30 A.M.

**REFRESHMENT BREAK** — 10:30 to 11:00 A.M.  
Sponsored by Spinnaker Analytics

**CONCURRENT SESSIONS & MICRO SUMMITS**  
— 11:00 A.M. to 12:00 NOON

**LUNCHEON** — 12:00 NOON to 1:30 P.M.  
Sponsored by ZS Associates

**CONCURRENT SESSIONS & MICRO SUMMITS**  
— 1:30 to 2:30 P.M.

**REFRESHMENT BREAK** — 2:30 to 3:00 P.M.

**CONCURRENT SESSIONS & MICRO SUMMITS**  
— 3:00 to 4:00 P.M.

**BREAK** — 4:00 to 4:15 P.M.

**GENERAL SESSION** — 4:15 to 5:00 P.M.

### **Taking the Conference to the Next Level**

**BIG DATA RECEPTION** — 5:30 to 6:30 P.M.

Sponsored by Acxiom

## Friday, June 26

**CONTINENTAL BREAKFAST** — 7:00 to 8:00 A.M.

**CONCURRENT SESSIONS & MICRO SUMMITS**  
— 8:00 to 9:00 A.M.

**REFRESHMENT BREAK** — 9:00 to 9:30 A.M.

**CONCURRENT SESSIONS & MICRO SUMMITS**  
— 9:30 to 10:30 A.M.

**BREAK** — 10:30 to 10:45 A.M.

**GENERAL SESSION** — 10:45 to 11:45 A.M.

### **Predictive Analytics in Your World**

**ERIC SIEGEL, Ph.D.**

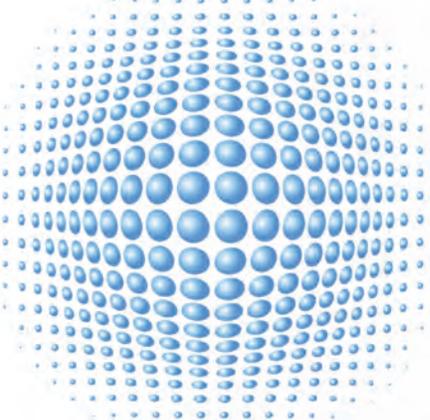
Founder

Predictive Analytics World and Text Analytics World

**CONFERENCE ADJOURNS** — 11:45 A.M.

# CONCURRENT SESSIONS & MICRO SUMMITS

<b>Thursday</b> 9:30 to 10:30 a.m.	<i>Choose ONE concurrent or TWO micro summits (1 from a-c, 1 from d-f)</i>		
	<b>Concurrent Sessions</b>		<b>Micro Summits</b>
	1.1 Harnessing the Power of Big Data	1.2 Don't Wait for the Data Enterprise Warehouse: Building Interim Data Capabilities	1.3a Finding the Future With Tamara 1.3b Where Are the Unicorns? 1.3c It's My Data and You Can't Have It 1.3d Connecting the Dots With David 1.3e Diamonds in the Rough 1.3f Going to Market
<b>Thursday</b> 11:00 a.m. to 12:00 noon	<i>Choose ONE concurrent or TWO micro summits (1 from a-c, 1 from d-f)</i>		
	<b>Concurrent Sessions</b>		<b>Micro Summits</b>
	2.1 Raising the Bar on Data Analytics Programs	2.2 Unlock the Hidden Value in YOUR Data	2.3a Finding the Future With Tamara 2.3b Where Are the Unicorns? 2.3c It's My Data and You Can't Have It 2.3d Connecting the Dots With David 2.3e Diamonds in the Rough 2.3f Going to Market
<b>Thursday</b> 1:30 to 2:30 p.m.	<i>Choose ONE concurrent or TWO micro summits (1 from a-c, 1 from d-f)</i>		
	<b>Concurrent Sessions</b>		<b>Micro Summits</b>
	3.1 Moving From Siloes to Connections	3.2 Power Up With Predictive Modeling	3.3a Sticks and Stones 3.3b Overcoming Intuition: Data-Driven Decision Making 3.3c Shopping for Jewels 3.3d Undertaking Underwriting 3.3e Lights, Camera, Action 3.3f Getting Help From the Outside (Sorry, No Vendors Allowed)
<b>Thursday</b> 3:00 to 4:00 p.m.	<i>Choose ONE concurrent or TWO micro summits (1 from a-c, 1 from d-f)</i>		
	<b>Concurrent Sessions</b>		<b>Micro Summits</b>
	4.1 How the Ethical and Appropriate Use of Data Can Revolutionize Customer Engagement and Brand Affinity	4.2 Make the Leap: Social, CRM, and Data Discovery	4.3a Sticks and Stones 4.3b Overcoming Intuition: Data-Driven Decision Making 4.3c Shopping for Jewels 4.3d Undertaking Underwriting 4.3e Lights, Camera, Action 4.3f Getting Help From the Outside (Sorry, No Vendors Allowed)
<b>Friday</b> 8:00 to 9:00 a.m.	<i>Choose ONE concurrent or TWO micro summits (1 from a-c, 1 from d-f)</i>		
	<b>Concurrent Sessions</b>		<b>Micro Summits</b>
	5.1 From Prediction to Action: Applying Analytics to Distribution Organizations	5.2 Bringing Big Data to Life for Underwriting	5.3a-c (Micro summits determined by Thursday's general session attendees) 5.3d-f (Micro summits determined by Thursday's general session attendees)
<b>Friday</b> 9:30 to 10:30 a.m.	<i>Choose ONE concurrent or TWO micro summits (1 from a-c, 1 from d-f)</i>		
	<b>Concurrent Sessions</b>		<b>Micro Summits</b>
	6.1 The Successful Analytic Organization	6.2 Data Governance & Master Data Management: A Tale of Two Cities	6.3a-c (Micro summits determined by Thursday's general session attendees) 6.3d-f (Micro summits determined by Thursday's general session attendees)



# big data analytics conference

## concurrent sessions & micro summits

Concurrent sessions offer traditional presentations and the micro summits are highly interactive, allowing attendees to share ideas on hot topics surrounding big data analytics. You will choose either one concurrent session or two micro summits for each time slot. Once you have registered to attend the conference, please watch for an email survey where you will be asked to choose between the concurrent and micro summit topics. Each micro summit will be limited to approximately the first 15 people who sign up for them.

## Thursday, June 25

9:30 to 10:30 A.M.

### 1.1 Harnessing the Power of Big Data

Big data has enabled a new era of omni-channel marketing, but it has also changed IT and marketing organization requirements. Some companies have embraced these changes faster than others as they've innovated new business models anchored in harnessing big data to uncover and act on customer insights.

Our presentation will focus on practical insights from work we've done with early adopters of big data, including:

- The problems and 'use cases' where big data, data mining, analytics and marketing execution make sense
- What results can be expected
- How to frame up your own big data implementation plan

**PETER C. DAVIS**, Group Vice President and Global Head of Consulting & Analytics, Acxiom

### 1.2 Don't Wait for the Data Enterprise Warehouse: Building Interim Data Capabilities

Having a robust and governed enterprise data warehouse is an important capability for enabling predictive analytics. The implementation process can be a lengthy undertaking however, with the complexities of blending data from multiple administration systems and web/mobile activity. This session provides a case study on how one company quickly created interim capabilities to produce reliable datasets for analytics using tools such as R, Google Analytics, & Tableau.

**DANIEL DUNN**, Second Vice President, Analytics, Protective Life

### 1.3a Finding the Future With Tamara

A follow-up discussion with Tamara Gaffney.

### 1.3b Where Are the Unicorns?

Developing or recruiting staff to acquire the skills of the data scientist.

### 1.3c It's My Data and You Can't Have It

Issues and resolutions surrounding privacy and compliance.

### 1.3d Connecting the Dots With David

A follow-up discussion with David Silverstein.

### 1.3e Diamonds in the Rough

How are you deriving value from your internal data?

### 1.3f Going to Market

Experiences (good or bad) in developing/implementing data-driven marketing campaigns.

11:00 A.M. to 12:00 NOON

### 2.1 Raising the Bar on Data Analytics Programs

Assessing your data analytics program can be a confusing and difficult task. However, LIMRA has developed a multi-dimensional framework that will help you assess your analytics program. Come and discover how this framework was developed and how you can use it to get your program to the next level.

**JOHN WILSON, FLMI, AIRC, ACS**, Data Scientist, LIMRA

### 2.2 Unlock the Hidden Value in YOUR Data

Regardless of the maturity of your organization's data and analytics capabilities, see how other carriers combined in-house talent and knowledge with select external services to create actionable insights. While big data needs analytics, analytics is not limited to big data. Two case studies will demonstrate best practices that you can implement quickly in your organization.

**ANTHONY CLURMAN**, Vice President, Strategic Planning and Execution, US Division, Sun Life Financial; Additional Speakers TBA; Moderator: **NIRAV DAGLI**, President, Spinnaker Analytics

# big data analytics conference concurrent sessions & micro summits



## 2.3a Finding the Future With Tamara

A follow-up discussion with Tamara Gaffney.

## 2.3b Where Are the Unicorns?

Developing or recruiting staff to acquire the skills of the data scientist.

## 2.3c It's My Data and You Can't Have It

Issues and resolutions surrounding privacy and compliance.

## 2.3d Connecting the Dots With David

A follow-up discussion with David Silverstein.

## 2.3e Diamonds in the Rough

How are you deriving value from your internal data?

## 2.3f Going to Market

Experiences (good or bad) in developing/implementing data-driven marketing campaigns.

1:30 to 2:30 P.M.

## 3.1 Moving From Siloes to Connections

Understanding the "true" version of customer data can be quite challenging. However, adopting strategies to enable this understanding might also afford you the opportunity to create a "data scientist" team. Learn how an analysis of data and people across functional units can have the added benefit of bringing skills together to form effective data analytics project teams. Ideal for companies that are early in their Analytics team journeys, this interactive Q&A session will leverage the experiences of companies that have faced these challenges, making strides toward greater Analytic maturity.

**DEBRA L. INGRAM**, Marketing Analytics & Reporting Director, Principal Financial Group; **DAVID KRAHN**, Assistant Director, Analytics, Northwestern Mutual Life

## 3.2 Power Up with Predictive Modeling

Predictive modeling has the potential to revolutionize life insurance products and processes, potentially touching on sales, marketing, underwriting, pricing, and in-force management. Sean and Patrick will explore ways predictive modeling can be used in life insurance including insights gained from the collaborative research efforts of Hannover Re and LexisNexis.

**SEAN CONRAD, FSA, MAAA, FIA, CFA**, Vice President, Actuary, Hannover Life Reassurance Company of America; **PATRICK SUGENT**, Vice President, Analytics, LexisNexis

## 3.3a Sticks and Stones

Tools you use and are considering.

## 3.3b Overcoming Intuition: Data-Driven Decision Making

The interplay among intuitive, experiential, and data-driven modes of decision-making, including the tensions that arise between them.

## 3.3c Shopping for Jewels

The role and value derived from external data.

## 3.3d Undertaking Underwriting

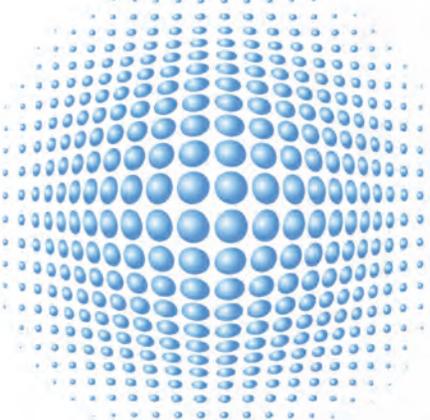
What might it take to make automated underwriting a reality?

## 3.3e Lights, Camera, Action

Communicating and implementing models.

## 3.3f Getting Help from the Outside (Sorry, No Vendors Allowed)

Strategies to utilize external resources that help your organization get to the next level (a peer-to-peer discussion; we ask that vendors not register for this session).



# big data analytics conference

## concurrent sessions & micro summits

3:00 to 4:00 P.M.

### 4.1 How the Ethical and Appropriate Use of Data Can Revolutionize Customer Engagement and Brand Affinity

Rapid consumer adoption of digital technology has fueled massive new sources of data. Each of these new data flows have compliance issues and considerations that must be understood, navigated, and ultimately adhered to by brands. How effectively, thoughtfully, and compliantly marketers harness these new data sources is under more scrutiny than ever by both consumers and regulators. This session provides guidelines for navigating the sensitive and critical world of consumer privacy in a customer-obsessed environment, and how to manage the often perceived as antithetical demands by consumers for greater transparency in how their data is used and more contextual and relevant offers and services from their brands of choice.

**SHEILA COLCLASURE**, Privacy Officer, the Americas, Acxiom

### 4.2 Make the Leap: Social, CRM, and Data Discovery

With the advent of social media, customer relationship management has seen a turn. This avenue for rich user declared data warrants the needs to understand it better. In a fast paced business environment, the need for the traditional sandboxes to try new things become pivotal. Analytics is no different. At this session, learn about the business problem that Samsung Electronics has solved using Hadoop as a data discovery environment. The intent is to communicate how this technical imperative enabled them in their journey to understand the customer better. Through the talk they will focus on the basic architecture and movement of data to formulate insight.

**RANJITH RAGHUNATH**, Sr. Manager, Innovation, Samsung Electronics America; **CHUCK SMITH**, Sr. Director, Samsung Electronics America

### 4.3a Sticks and Stones

Tools you use and are considering.

### 4.3b Overcoming Intuition: Data-Driven Decision Making

The interplay among intuitive, experiential, and data-driven modes of decision-making, including the tensions that arise between them.

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The role and value derived from external data.

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Communicating and implementing models.

### 4.3f Getting Help from the Outside (Sorry, No Vendors Allowed)

Strategies to utilize external resources that help your organization get to the next level (a peer-to-peer discussion; we ask that vendors not register for this session).

## Friday, June 26

8:00 to 9:00 A.M.

### 5.1. From Prediction to Action: Applying Analytics to Distribution Organizations

It's often easier to develop analytic insight than it is to take action on that insight, especially when distribution channels are involved. While marketing tactics can often be redirected automatically, behavioral change is often needed to realize the full benefit of analytics applied to agents, advisors, or other salespeople. On this panel, we'll hear from two companies who have applied analytics through their sales channels, both captive and independent. We'll provide examples of what's worked — and what hasn't — and discuss keys to success in deploying analytics through distribution organizations.

**CURT ROLOFF**, Commercial Selling Systems and Sales Analytics, Humana; **PANKAJ SINGH**, Second Vice President, Enterprise Data Transformation, Aflac; **Moderator: JASON BROWN**, Principal, ZS Associates

### 5.2. Bringing Big Data to Life for Underwriting

It should come as no surprise that making sense of the exabytes of customer data that insurers have amassed over decades of doing business, offers breakthrough potential for underwriters — from enhancing legacy, business-critical workflows that improve the overall customer experience, to optimizing underwriting procedures which drive meaningful change in sales, marketing and underwriting precision. Come to this session to hear some of the common challenges insurers face — and winning strategies insurers take — when it comes to integrating data with the underwriting process.

**DAVID CASTELLANI**, Senior Vice President, Business Information Officer, New York Life Insurance Company; **KUANG CHEN**, Founder & CEO, Captricity

# *big data analytics conference*

## *concurrent sessions & micro summits*



### **MICRO SUMMITS DETERMINED BY THURSDAY'S GENERAL SESSION ATTENDEES**

*9:30 to 10:30 A.M.*

#### **6.1. The Successful Analytic Organization**

The mission of the analytics function is straightforward — enable the business to achieve greater financial results by better managing its most important assets, customers. This is accomplished by providing a range of services that help optimize the marketing mix — improving audience targeting, pinpointing the best offers and communication content and frequency, and determining channel preferences. This session will outline the ingredients for developing a center of excellence in analytics — an organization that demonstrably impacts the company's bottom line — and provide real-world examples of best-in-class analytics that deliver that outcome.

**ANGELA WILLIAMS**, Vice President, Center for Advanced Analytics, Transamerica; **JOHN YOUNG**, Senior Vice President & Managing Director, Analytic Consulting Group, Epsilon

#### **6.2. Data Governance & Master Data Management: A Tale of Two Cities**

Companies spend millions of dollars on data related activities (e.g., data accessibility, quality, visibility, hierarchy, etc.) and often underestimate the critical importance of implementing robust data governance and data management principles. This session will highlight frameworks, best practices, and techniques used by leading insurance companies to optimize their enterprise data ROI.

**CHRISTOPHER COONEY**, Vice President, Pricing, Corporate Underwriting and Information Services, RBC Insurance;  
**NICOLAS E. LANCE**, RMA, Vice President, Retirement Income Strategies & Head of Customer Data Strategy, OneAmerica

### **MICRO SUMMITS DETERMINED BY THURSDAY'S GENERAL SESSION ATTENDEES**

*Thank You to Our Conference  
Sponsors and Exhibitors*



# Conference Details

## TO REGISTER

**Online:** [www.limra.com/bigdataconf](http://www.limra.com/bigdataconf)

### REGISTRATION FEES

#### **By June 4 (Conference & Seminar):**

LIMRA member	\$1,495
LOMA (but not LIMRA) Member	\$2,145
Nonmember	\$2,790

#### **By June 4 (Conference Only):**

LIMRA member	\$1,145
LOMA (but not LIMRA) Member	\$1,720
Nonmember	\$2,290

#### **After June 4 (Conference & Seminar):**

LIMRA member	\$1,695
LOMA (but not LIMRA) Member	\$2,445
Nonmember	\$3,165

#### **After June 4 (Conference Only):**

LIMRA member	\$1,295
LOMA (but not LIMRA) Member	\$1,945
Nonmember	\$2,590

**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 this conference is casual.

## HOTEL INFORMATION



### **Seaport Hotel & World Trade Center**

200 Seaport Blvd.

Boston, MA

Phone: 1.800.877.SEAPORT

Please make your reservation by calling the reservations phone number and mention the LIMRA Big Data Analytics Conferences by May 29, 2015 to obtain the group rate of \$279 single/double plus tax. Reservations made after May 29, 2015 will be at the prevailing rate and based on space availability. The group guest room rate will be offered three days prior and three days after the meeting dates and subject to availability of rooms at the time of your reservation. Reservations must be guaranteed with a major credit card.

Check-in time is 3:00 p.m./check-out time is 12:00 noon.

## CANCELLATION POLICY

All cancellations must be received in writing. Cancellations received before June 4, 2015, will be refunded, less a \$75 processing fee. Cancellations received from June 4, 2015, to June 18, 2015, will be refunded, less a \$275 processing and administrative fee. No refunds will be issued after June 18, 2015.

In the event that a scheduled meeting or event is cancelled by LIMRA for any reason, LIMRA shall refund any conference registration fees that have been paid by the registrant. Under no circumstances, however, shall LIMRA be liable to the registrant for any other expenses including, but not limited to, airfare and hotel expenses incurred by the registrant.