

2019 CONFERENCES

Enrollment Technology Strategy Seminar

Improving Performance Through Technology



February 5 – 6, 2019
Miami Marriott Biscayne Bay Hotel
Miami, FL



www.limra.com/etss

2019 Enrollment Technology Strategy Seminar

TUESDAY, FEBRUARY 5

REGISTRATION — 7:00 to 8:15 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,
U.S. Client Services
LIMRA*

GENERAL SESSION 1 — 8:15 to 9:15 a.m.

LIMRA Workplace Benefits Electronic Data Exchange (WBEDX) Standards

Sixteen insurance companies and 11 benefits administration technology companies have been working together to develop data exchange standards for the non-medical workplace benefits market. We are excited to share our work efforts and demonstrate a prototype of both the structured file format and the API solutions. This will be your opportunity to provide input and view the value of data exchange standards can bring to our industry.

BREAK — 9:15 to 9:30 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.

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

1. Tech Terminology: Family Feud Edition

The insurance and technology industries each use their own acronyms, shorthand, and abbreviations to communicate — but they can be overwhelming to those not yet accustomed to these terms. Attend this interactive session to:

- Play terminology Family Feud and compete with your industry peers for bragging rights and prizes.
- Learn the fundamental terminology that defines our industry and professional conversations.
- See how well your peers know their technology acronyms and terminology.

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

2. The Broker's Perspective on Employer Technology Decisions

Hear from leading experts in the broker benefit administration field how employers choose the best platforms for benefit administration and enrollment technology.

Join this session to discuss:

- What employers evaluate in a platform and how they determine the best one to choose.
- Is it better to use an all-in-one platform that handles everything from enrollment to payroll?
- Is it better to have separate systems that specialize in their own function?
- What is expected of the carrier when a system is chosen?

KURT GEHRING, President and Chief Executive Officer, Gehring Group & BenTek, Inc.; **Moderator:** **BRYAN WELLS**, Benefits Technology Consultant, The Standard

BREAK — 10:30 to 10:45 a.m.

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

1. Tech Terminology: Family Feud Edition
2. The Broker's Perspective on Employer Technology Decisions

LUNCH — 11:45 a.m. to 1:00 p.m.

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

3. Cyber Hygiene: Multi-Faceted Approach to Data Protection

Data is the new currency. Protecting the unwanted exposure of data and applying safeguards to limit exposure is top of mind for enterprise organizations. Knowing what to do when the unforeseen happens is critical. Panel discussion topics will include:

- Trends in data privacy and the essentials of a multi-faceted data protection program
- What to do in the face of a data breach
- Proper cyber hygiene to protect against fraudsters and further outbreaks

RYAN BALDWIN, Chief Technology Officer, PlanSource;
ELIZABETH O'BRIEN, Chief Compliance Officer & Chief Privacy Officer, Trustmark Companies; **FAWAZ RASHEED**, Chief Information Security Officer, Trustmark Companies;
Co-Moderators: ERIK FADLOVICH, Senior Director Enrollment Technology, Trustmark Companies; **TODD SUTER**, Relationship Lead U.S. Benefit Exchange & Technology Solutions, Cigna

4. Evolution of Ben Admin Distribution

Distribution is changing: carriers are realizing that they can't compete any longer without having benefits technology relationships, and brokers are looking for ease of doing business with off-the-shelf products. Come hear different perspectives on how distribution of products through technology platforms and relationships with carriers can grow your business. Explore:

- Different types of ben admin and their value prop.
- How carriers engage differently with TPA's, HRIS, ben admin, and enrollment firms.
- Impacts technology has made in the marketplace and growing role within distribution.

CANNON ALLEN, President, Davis, Allen Agency, Inc.;
JEN DANIEL, Vice President, Premier Technology Partnerships, Aflac; **JILL HERNANDEZ**, Director, Strategic Partnerships, Empyrean Benefit Solutions; **Co-Moderators: BRANDON COOK**, Director, Platform Integration, Group Insurance, Prudential; **JENNI MCGLATHERY**, Senior Business Manager, Business Development, Dearborn National

BREAK — 2:00 to 2:15 p.m.

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

3. Cyber Hygiene: Multi-Faceted Approach to Data Protection
4. Evolution of Ben Admin Distribution

BREAK — 3:15 to 3:30 p.m.

GENERAL SESSION 2 — 3:30 to 4:30 p.m.

Demystifying Machine Learning

KARAN MISHRA

COO/CIO

Spraoi

TOM DAVENPORT, Moderator

AVP, Workplace Integration

Transamerica

Machine learning is a part of our everyday: Every web page you visit, every online purchase you make, and every search made in Google and Amazon determines what you are presented with next. How can we apply this concept of machine learning within the insurance enrollment technology industry?

- Explore a case study where machine learning is being applied in insurance enrollments.
- Obtain an overview of the machine learning process and learn what organizations should consider when looking to implement this process.
- Learn about opportunities to apply machine learning across the functional value chain.

GALLERY WALK RECEPTION — 5:30 to 7:00 p.m.

LIMRA DINNER — 7:00 to 8:30 p.m.

2019 Enrollment Technology Strategy Seminar

WEDNESDAY, FEBRUARY 6

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

CONCURRENT SESSIONS — 8:15 to 9:15 a.m.

5. Analyzing Data Analytics — The Customer Is the Winner!

Data analytics and how it's used to create customer-centricity could be the key to the success of your business going forward. Attend this session to understand:

- The importance of data analytics and how to use it effectively
- How this data can be used to increase employee engagement and create revenue
- Barriers and detractors that need to be addressed

SCOTT EVANS, Chief Product Officer, Benefit Express;
GINA ORTIZ, Director of Product Strategy, Benefit Express;
MATTHEW SYDNEY, CEO, Picwell; **Co-Moderators: CHERYL FUGATE**, Assistant Director, Partnership Strategy and Development, The Hartford; **BRYAN WELLS**, Benefits Technology Consultant, The Standard

6. Alexa, Can You Enroll Benefits?

Virtual assistants are in our homes and on our phones — over 50 million Amazon Echo and Google Home devices have been sold in the U.S. How can these virtual assistants be utilized in enrollment technology? Participate in this interactive session to explore:

- Regulatory/compliance issues to consider and uses for decision support/education
- Possible uses for virtual assistants and enrollment technology
- Potential challenges for integrating virtual assistants with enrollment technology

Moderator: TOM DAVENPORT, AVP, Workplace Integrations, Transamerica

BREAK — 9:15 TO 9:30 A.M.

WORKSHOPS ARE REPEATED — 9:30 TO 10:30 A.M.

5. Analyzing Data Analytics — The Customer Is the Winner!

6. Alexa, Can You Enroll Benefits?

BREAK — 10:30 to 10:45 a.m.

GENERAL SESSION 3 — 10:45 to 11:45 a.m.

Riding the Gen Z Wave

ANITA POTTER

Assistant Vice President
LIMRA

In fewer than 10 years, Gen Z (born after 1995) will represent approximately 20 percent of the U.S. workforce. As with all new entrants to the workforce, Gen Zers are often stereotyped long before they have the opportunity to establish themselves. This interactive session will help you explore the biggest myths about Gen Zers, and how this new generation of “digital natives” will impact your strategic objectives for employee benefits technology.

ADJOURNMENT — 11:45 to 11:50 a.m.

THANK YOU TO OUR COMMITTEE MEMBERS

BRANDON COOK, Prudential

TOM DAVENPORT, Transamerica

ERIK FADLOVICH, Trustmark Insurance

CHERYL FUGATE, The Hartford

JENNI MCGLATHERY, Dearborn National

ANDREW MOORE, Lincoln Financial Group

TODD SUTER, Cigna

BRYAN WELLS, The Standard

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