



Enrollment Technology Strategy Seminar

Managing Change in the Big Easy

February 4 – 5, 2020

JW Marriott, New Orleans, LA USA



www.limra.com/etss

Enrollment Technology Strategy Seminar

2020



► Tuesday, February 4

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

Director, Member Relations and Sales – Workplace Benefits and Staff Representative, U.S. Client Services
LIMRA

GENERAL SESSION 1 — 8:15 to 9:00 a.m.

LIMRA Data Exchange Standards (LDEX) Update

ERIN CASEY

AVP, Benefits Technology Solution and Partnerships
Guardian Life Insurance Company of America

LYLE GRIFFIN

President
Selerix Systems

MARK KOZIELEC

Director of Institutional Client Data
Prudential

BETINA MUSSER

Product Manager, Strategic Partnerships
Benefitfocus

LIMRA Data Exchange Standards Benefits Enrollment 1.0 is scheduled to be released to the industry on January 28. A number of the committee member companies have implemented this standard. Several companies will share their implementation experiences and discuss why the industry should adopt this new standard.

BREAK — 9:00 to 9:15 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.

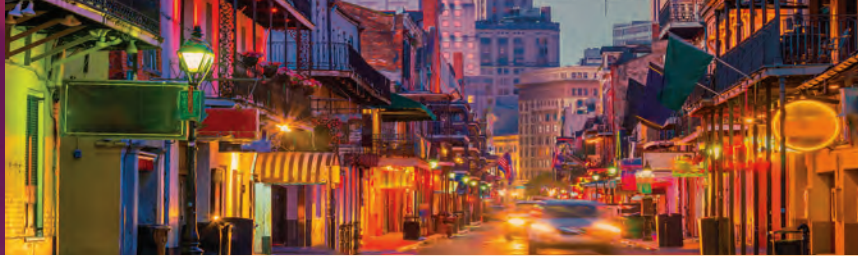
CONCURRENT SESSIONS — 9:15 to 10:15 a.m.

1. Got Bills? Why Is Billing So Hard?

Are we making billing harder than it needs to be? The billing experience continues to be a source of frustration for everyone involved with the billing process. Can we answer the age old question of who's picking up the bill? Our panel will address all these questions and explore:

- How can carriers leverage benefit technology to optimize the billing experience?
- When does it make sense to do list billing vs. self-billing? How can we be more consultative?
- Why is list billing still so popular despite the rise of benefit technology?

TOM DAVENPORT, Senior Director, Product Development, US Able Life; **RICHARD PFADENHAUER**, President & Founder, Paylogix; **BRADLEY TAYLOR**, EVP Strategic Partnerships, PlanSource; **Moderator: RICK NEWBY**, Business Analyst, Workplace Integrations, Transamerica



2. To Modify or Not to Modify Your Product...

Most enrollments today are being done on technology platforms that were implemented after enrollment products were created. Is this causing employees to lose some of the added benefits as we simplify? Join this session to discuss whether we have appropriately cared for the implications of technology handling these products, and if insurance carriers should modify them to better fit the technology.

ROBIN BABU, Vice President, Product & Innovation, PlanSource; **NICK CARLSON**, Vice President Operations, Allstate; **JANICE CHAUSSEE**, Senior Director, Product Management, National Account Benefits, ADP; **TIM O'CONNOR**, Director, Partner Integration, Voya Financial; **Moderator: BRANDON COOK**, Director, Platform Integration – Group Insurance, Prudential

BREAK — 10:15 to 10:30 a.m.

WORKSHOPS ARE REPEATED — 10:30 to 11:30 a.m.

1. Got Bills? Why Is Billing So Hard?

2. To Modify or Not to Modify Your Product...

LUNCH — 11:30 a.m. to 12:30 p.m.

GENERAL SESSION 2 — 12:30 to 1:30 p.m.

Navigating the Legal and Regulatory Landscape

JOHN DOLAN, Lead Counsel, Commercial and Government Markets, Guardian Life Insurance Company of America; **BRUCE GILLIS**, Strategy Practice Leader, Health, Welfare and Compliance, Businessolver; **Moderator: KEITH FEIST**, Benefits Technology Consultant, The Standard

Employee benefits are making headlines at the federal and state levels. This session will provide insights into:

- Key policy issues such as ACA, auto-enrollment, cyber security and emerging employee benefits
- How party changes in the House, Senate, and presidency could impact policy direction
- Issues carriers and tech companies need to prepare for

BREAK — 1:30 to 1:45 p.m.

CONCURRENT SESSIONS — 1:45 to 2:45 p.m.

3. Engaging the “Easy Going” in Employee Benefits

It's our role in our organizations to reach all employees effectively and ensure that they have the right information in their preferred method to make the best benefit decisions for them and their families. In this interactive session, we will discover how well you know your benefit decision makers to maximize on benefit premiums and increase employee engagement.

Co-Moderators: CHERYL FUGATE, Senior Manager, Group Enrollment, The Hartford; **JENNI MCGLATHERY**, Senior Manager, Business Development, Dearborn National

4. Enrollment Technology Trends and Traps

How can your company future-proof its business? How can it avoid the traps of chasing digital transformation in a chaotic landscape? Attend this session to explore these topics with a thought leader panel including broker, technology broker, technology solution provider, and carrier perspectives.

BRYAN MORENS, Senior Vice President, Product Development and Solutions, AON; **KENDIE STROEDE**, Supplemental Health Solutions Integration Lead, Cigna; **JOSH WELCH**, Healthcare Strategy and Solutions Leader, Aflac; **Moderator: SCOTT JOHNSON**, Director, Benefit Exchange & Technology Solutions, Cigna

BREAK — 2:45 to 3:00 p.m.

WORKSHOPS ARE REPEATED — 3:00 to 4:00 p.m.

3. Engaging the “Easy Going” in Employee Benefits

4. Enrollment Technology Trends and Traps

BREAK — 4:00 to 4:15 p.m.

THANK YOU TO OUR COMMITTEE MEMBERS

- BRANDON COOK** — Prudential
- KEITH FEIST** — The Standard
- CHERYL FUGATE** — The Hartford
- SCOTT JOHNSON** — Cigna
- JENNI MCGLATHERY** — Dearborn National
- RICK NEWBY** — Transamerica
- LEILA RAPPAPORT** — Aflac
- JENNIFER PIERCE** — Lincoln Financial
- ROB STANFIELD** — Washington National

Enrollment Technology Strategy Seminar



GENERAL SESSION 3 — 4:15 to 5:00 p.m.

Adapt to Thrive — Being Resilient in the Big Easy

CHUCK JOHNSON

Chief Marketing Officer
Fineos

JENNI MCGLATHERY

Senior Manager, Business Development
Dearborn National

“Laissez les bon temps rouler” or “let the good times roll” is easier said than done when the only constant is change. This Town Hall session will address the changes we’re facing in relation to working with platform partners, including how carriers are managing fees, agreements, oversight, and their number of connections. Then we’ll turn it over to you to share your stories, ask questions, and lend your voice to the discussion.

LIMRA RECEPTION/DINNER — 6:00 to 8:30 p.m.

Arnaud’s

All conference attendees are invited to dinner.

► **Wednesday, February 5**

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

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

5. Data Security in an Interconnected World

Security is no longer about centralizing your data and locking it away in a virtual vault. Today’s business processes demand anytime and any place access to key information. In an increasingly matrixed, cloud-based technology ecosystem, how can customers have peace of mind with respect to confidential information?

- Help the audience understand key security considerations and how ownership of data is viewed in an ecosystem characterized by multiple connections. How can we work together to keep data secure?
- Carrier and technology companies cannot grow their business if they don’t adhere to strict data security and ownership guidelines.
- What are the threats and opportunities in this new interconnected world?

MATTHEW HARPER, Director, Cyber Crime Prevention, Aflac;

Moderator: LEILA RAPPAPORT, Broker Technology Executive, Aflac

6. Do We Understand Buyer Wants and Needs?

Do you know what benefit features are truly important to the employee? LIMRA will share the results of the latest employee survey which explores the various features of the life, critical illness, and accident products that clearly resonate with employees.

INAH CHAMBERS, Director, Member Relations & Sales – Workplace Benefits, LIMRA; **ANITA POTTER**, AVP, Market Research, LIMRA

BREAK — 9:15 to 9:30 a.m.

WORKSHOPS ARE REPEATED — 9:30 to 10:30 a.m.

5. Data Security in an Interconnected World

6. Do We Understand Buyer Wants and Needs?

BREAK — 10:30 to 10:45 a.m.

GENERAL SESSION 4 — 10:45 to 11:45 a.m.

Transforming the Insure in the InsurTech Age

TOM HARRINGTON

Global Industry Markets Leader for Insurance
Pegasystems Inc.

BRIAN WILSON

Vice President, Field Development
CNO Financial, Inc.

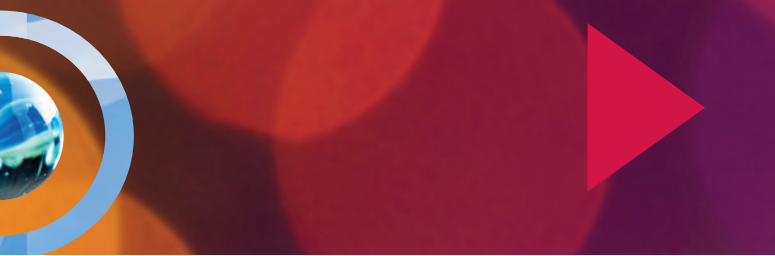
ROB STANFIELD, Moderator

Director, Sales Technology
CNO Financial, Inc.

InsurTech, social reform, changing consumer expectations: our industry is under more pressure than ever to reinvent itself. Successful insurers are stepping up to the challenge by leveraging these strategies to re-position themselves for today’s market.

- Transforming from a task-focused to journey-centric
- Creating an end-to-end holistic processing environment
- Omni-channel access
- Using change management to create successful transformation
- Flexible, responsive environments

ADJOURNMENT — 11:50 p.m.



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