



**MIAMI / NOVEMBER 9-11, 2014**

**INSURANCE &  
TECHNOLOGY**

**"The Agile Insurer: Speed, Insight, Engagement  
An 2014 Insurance & Technology Executive Summit"  
Miami, FL - November 9-11, 2014**

## AGENDA

### **SUNDAY, NOVEMBER 9**

**12:00 pm - 5:00 pm**

Golf Tournament

**3:00 pm - 8:30 pm**

Registration

**3:30 pm - 5:30 pm**

**Meet the Editors**

Stop by to meet the I&T editorial team, bring us up to date on your organization, and let us know about new initiatives and your thoughts about the hot topics in insurance technology. Learn about I&T content opportunities and engagement with the community.

**6:30 pm - 8:30 pm**

2014 Executive Summit Welcome Reception

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### **MONDAY, NOVEMBER 10**

**7:30 am - 8:30 am**

Networking Breakfast

## **8:30 am - 8:45 am**

Welcome/Introduction: The Reality of Agility

## **8:45 am - 9:25 am**

### **Opening Keynote: How to Be a Winner in the New Competitive Environment**

**Speaker:** Brian LeClaire, CIO, Humana

It's one thing to aspire to agility and innovation, quite another to go beyond the rhetoric and gain the benefits of responsiveness, insight and speed. A top insurance executive on the front lines of transformation reveals the advantages that come from being a truly digital insurer.

## **9:25 am - 10:00 am**

### **Achieving Innovation - Beyond the Hype to Growth**

**Speaker:** Bob Scheppegrell, Senior Vice President of New Business Development, Lincoln Financial Group

What are the types of investments, cultural changes and organizational transformation insurers need to embrace in order to innovate effectively, and what are the possible challenges insurance companies can expect to encounter on this journey? The executive responsible for leading innovation that drives growth at Lincoln Financial Group reveals what it takes to bring innovation to the forefront.

- How to effectively manage the Innovation process.
- Leveraging technology for business innovation.
- How to "fail" efficiently in innovation, while learning

## **10:00 am -10:30 am**

### **The Insight Advantage: Beyond Big Data to Smart Data**

**Speaker:** Peter Hahn, Head of Predictive Analytics, Zurich

As the implementation of analytics and other data management capabilities moves from leading edge to table stakes, industry leaders are moving to the next level of "smart data," an approach that associates true value with the data. What does it take to create a sustainable and profitable smart data culture?

## **10:30 am - 10:45 am**

Refreshment Break

## **10:45 am - 12:15 pm**

One-on-One Sponsor Meetings

## **12:15 pm - 1:00 pm**

Networking Lunch

## **1:00 pm - 2:00 pm**

**Workshop: Creating a Culture of Innovation and Collaboration**

**Speaker:** Frank Petersmark, CIO Advocate, X by 2

Making innovation a shared mission is an ongoing process. Many insurance companies are bolstering the effort with innovation labs that foster collaboration, idea-generation and results. We'll launch our own innovation labs via interactive working groups to gain insights into how this works and what it takes to sustain the benefits.

**2:00 pm - 2:30 pm**

**Cloud and Virtualization: The Foundation for Agility**

**Speakers:** Bryan Fowler, Chief Information Officer, VP Information Technology, Oregon Mutual Insurance | Feroz Merchhiya, CTO, CIGA

Insurers that view the cloud mainly as an opportunity to reduce infrastructure expenditures are limiting themselves. Cloud and other virtualized services can help businesses improve agility, customer satisfaction, financial performance AND operational efficiency – and do so securely. How is the cloud helping insurance companies get to market faster with new offerings, and how can carriers mitigate potential risks?

**2:30 pm - 3:00 pm**

**Outside the Box: Agility Lessons From Beyond Insurance**

With non-traditional competition - from the likes of tech companies, retailers and other agile players - becoming a more significant factor in financial services, it makes sense for insurers to look beyond industry boundaries for new ideas, practices and business models. We'll get the inside story on why insurance is ripe for disruption - and how carriers can turn the challenge to their advantage.

**3:00 pm – 3:15 pm**

Executive Summit Day One Wrap

**6:00 pm - 7:00 pm**

2014 Elite 8 Awards Cocktail Reception

**7:00 pm - 10:00 pm**

2014 Elite 8 Awards Dinner & Ceremony

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**TUESDAY, NOVEMBER 11**

**7:30 am - 8:30 am**

Networking Breakfast

**8:30 am - 9:30 am**

### **Strategic Issues Roundtables**

Join with your peers to discuss some of the most critical topics in the insurance industry today. In these off-the-record discussion groups you will share war stories, make contacts and learn from other insurance executives who share your concerns on key strategic and technology issues.

#### **9:30 am -10:00 am**

##### **Beyond the Buzzwords: Where's the ROI on Agility and Innovation?**

What kinds of investments – in technology, human capital, partnerships – are insurers making to boost agility, and do executives think these investments are paying off? What are the biggest hurdles and challenges carriers face in the efforts to become more agile and innovative organizations? Gain insights into the numbers behind the buzzwords.

#### **10:00 am -10:45 am**

##### **Collaboration, Community, Competition: Assessing the Insurance Tech Landscape – An Elite 8 and Technology Company Point/Counterpoint**

Elite 8 honorees and leading technology company executives come together in an open debate over budgets, resource management, priorities and competitive strategy in today's complex multi-channel, increasingly digital, insurance business.

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#### **10:45 am - 11:00 am**

Refreshment Break

#### **11:00 am - 12:30 pm**

One-on-One Sponsor Meetings

#### **12:30 pm - 1:15 pm**

Networking Lunch

#### **1:15 pm - 1:45 pm**

##### **Core Stories: Mastering Modernization**

**Speakers:** Larry Fortin, VP, Chief Information Officer, Miller's Mutual | Donald Light, Director, Celent's Americas Property/Casualty Insurance Practice | Bob Valliere, VP Policyholder Service & Solutions, CSAA

Modern core systems provide the foundation for agility – this is the rationale for most core

transformation initiatives. Yet the path to a successful policy admin, claims, billing or underwriting systems replacement continues to be strewn with obstacles and challenges. Insurers that have navigated the journey share why it's still so difficult and the best practices that have emerged to master core systems modernization.

### **1:45 pm - 2:15 pm**

#### **The Next Big Thing: The Future of Insurance Technology**

In financial services, what's innovative today typically becomes a commodity offering tomorrow. Where should insurers be focusing and investing in order to be ahead of the curve in terms of products, services and channels that will engage customers and dominate the market? What's the next hot thing in consumer technology and how will it reshape insurance distribution and operations in the future?

### **2:15-pm - 2:30 pm**

Executive Summit Day 2 Wrap