

LIC Annual Meeting & Marketing Conference

A View to the Future

February 3-4, 2021 | Via Webex, 10am-3pm ET

This year, the industry's *only* conference dedicated to networking and practical solutions for small-to-midsized life insurance companies was held as a live interactive videoconference over two days. Click the buttons to access the meeting recordings and speaker handouts.

Meeting Handouts & Attendee List

Wednesday, February 3, 2021

10:00 a.m. ET **Welcome from LIC's 2020 Chair**

SLIDES

Susan Thomas, President/CEO, Texas Service Life

RECORDING

10:15 a.m. **The Effortless Experience:**

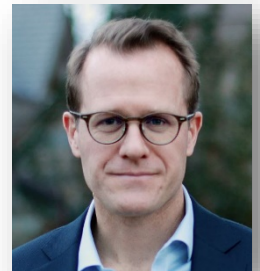
SLIDES

Conquering the New Battleground for Customer Loyalty

Matthew Dixon, PhD, Chief Product & Research Officer, Tethr

Everyone knows that the best way to create customer loyalty is with service so good, so over the top, that it surprises and delights. But what if everyone is wrong? In *The Effortless Experience*, Dixon and his colleagues turned conventional wisdom on its head, producing one of the most influential books ever published in the customer experience space. Most customers don't want to be "wowed"; they want an effortless experience. Matt Dixon will take you on a fascinating journey deep inside the customer experience to reveal what really makes customers loyal—and disloyal. He'll lay out the four key pillars of a low-effort customer experience, delivering robust data, shocking insights, and profiles of companies that have seen results using these research-based principles.

Matt Dixon is one of the world's leading experts on sales, customer service and customer experience. He currently serves as Chief Product & Research Officer of Tethr, an AI venture that helps companies mine customer voice data for insights. Matt is a frequent contributor to *Harvard Business Review* and author of *The Challenger Sale: Taking Control of the Customer Conversation* and *The Effortless Experience: Conquering the New Battleground for Customer Loyalty*.



MATT DIXON

Pre-Meeting Happy Hour

Tuesday, February 2, 2021, 7-8 p.m. ET

A casual BYOB get-together on Remo, a web platform that approximates a face-to-face networking event!

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Wednesday, February 3, 2021, continued

11:15 a.m. **The Innovation Journey of a 115 Year Old Mutual Company**

SLIDES

Steve Shaffer, FLMI, CPA, CEO, Homesteaders Life Company

RECORDING

Homesteaders Life Company, a 115 year old mutual company in a mono-line business, has adopted an innovation imperative over the past few years. Hear how Homesteaders set up a framework for innovation, addressed the challenges of change in a traditional organization and industry, and the lessons learned so far along that journey.



STEVE SHAFFER

12:00 p.m. **BREAK**

1:00 p.m. **A View to the Future: Facilitated Discussion**

SLIDES

Jeffrey S. Shaw, CLU, ChFC, Executive Director, LIC

RECORDING

The number-one value cited by LIC conference attendees is the ability to participate in open discussions with peers. This is your chance to share perspectives with your peers in facilitated discussion prompted with live polling. Questions were pre-submitted by registrants, such as biggest challenges during the pandemic, technology innovations and priorities, and plans and expectations for 2021.



JEFF SHAW

3:00 p.m. **MEETING SESSIONS ADJOURN FOR THE DAY**

7-8:30 p.m.



SPECIAL FEATURE

Virtual Mind Amazements with Jon Stetson, America's Master Mentalist

Join us for a very special evening with your fellow LIC members. We'll kick off with a few words from LIC Chair Susan Thomas and the traditional passing of the gavel to incoming Chair Byron Allen. Then, prepare for intelligent, interactive FUN with Jon Stetson, America's Master Mentalist! Stetson blends the art of Mystery with the study of Psychology, the predictability of human nature and the power of intuition, with a disarming sense of humor. Feel free to include your family! Spouses are encouraged, and older kids (teens on up) may also enjoy the show with you. The meeting room will be open 15 minutes before and after the meeting for additional conversation.

This special feature is brought to you by the following Deluxe Annual Meeting & Event Sponsors:



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Thursday, February 4, 2021

10:00 a.m. ET **Welcome from LIC's Incoming 2021 Chair**

RECORDING

Byron Allen, President/CEO, American Savings Life Insurance Company

10:05 a.m. **Real Demographic Facts for New Reality Strategies**

HANDOUT

Kenneth W. Gronbach, Demographer, Futurist and Author

Ken Gronbach is a nationally recognized author, expert and futurist in the field of Demography and Generational Marketing who has been able to forecast societal, commercial, economic, cultural and political phenomena with uncanny accuracy. He makes the science of shifting demography come alive with real-life examples that make it relevant to today's culture, business climate and economy. His unusual blend of marketing savvy and common sense demography, based on twenty years of proprietary demographic study, set him apart.

Kenneth W. Gronbach is president of KGC Direct, LLC and author of "Upside: Profiting from the Profound Demographic Shifts Ahead," and "The Age Curve: How To Profit from the Coming Demographic Storm."



KEN GRONBACH

Thursday, February 4, 2021, continued

11:00 a.m.

Experimenting Your Way To Innovative Growth

SLIDES

J. Scott Sanchez, Product Innovation Officer, Deluxe

Today, it seems as if everybody wants to be more innovative to stay ahead of the competition. While there are thousands of books, articles, and courses you can take, the best way to do it is to actually do it. In other words, the best way to learn something is to try it out, make some mistakes and successes along the way, and learn from each and every one of them. In this session, you will learn how to create a series of experiments that you can utilize to accelerate your journey to becoming more innovative.

Scott Sanchez is an Innovation Leader, with extensive experience in innovation, product management and design, with a history of making simple, yet impactful products and experiences that delight users. He is currently responsible for driving innovation and product management at Deluxe, and was the first ever Chief Innovation Officer at Nationwide.



SCOTT SANCHEZ

12:00 p.m.

BREAK

1:00 p.m.

Maelstrom of Security

SLIDES

Jerry J. Petru, Fellow, FBCS, CITP, CISSP, CISM, President, Washington State Infragard Chapter

Hacking activity is at an all-time high, and despite billions spent on cybersecurity, companies aren't truly safe from hacks. Learn about the magnitude of the issue, types of threats and the actors that bring them, and whom you should be concerned with. You'll get practical advice and tools you need to be aware of and deploying. Find out how to control the burn and build a cybersecurity framework that works, how to detect, respond and recover, and resources available to help. Hang on for a whirlwind tour and interactive discussion, and bring your questions. You'll leave with plenty of new information and strategies!

Jerry Petru is a Chartered Fellow of BCS, The Chartered Institute for IT. He has served as a virtual Chief Security Officer to a number of clients; he's an innovative and technically sophisticated professional with a proven track record of success in designing and implementing system security controls, high availability, business continuity, disaster recovery, and long-range strategic plans for Fortune 100 Companies.



JERRY PETRU

2:00 p.m.

Rating Agency Perspective

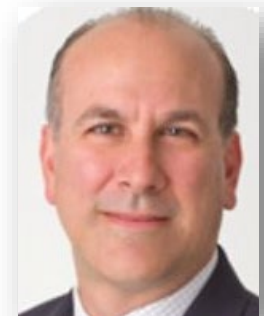
RECORDING

Peter Giacone, Managing Director and Global Head of Insurance Ratings, Kroll Bond Rating Agency

This session is designed promote dialogue, share knowledge and address your questions.

Key areas of discussion include:

- Impact of COVID
- Implications of persistent low interest rates
- The expanded role of technology



PETER GIACONO

3:00 p.m.

ADJOURN – SEE YOU NEXT YEAR



Questions?

For technical support during the meeting or other questions:

- Contact LIC at lic@loma.org
- Send a text message to Christa Horne at (770) 984-3712
- Send a chat message in the Webex panel to Christa Horne



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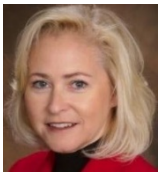
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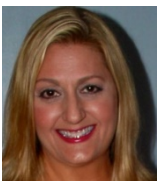


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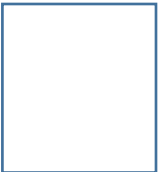
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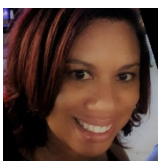


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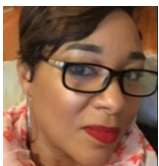


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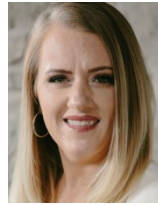
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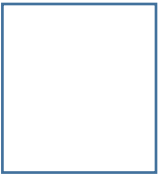
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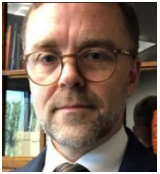
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