



Strategies for Innovation at Smaller Companies



LIC Technology Committee Meeting

Hosted by GPM Life | San Antonio | September 27-28, 2023

www.loma.org/LICTECH



Meeting Location: GPM Life, 2211 NE Interstate 410 Loop, San Antonio, TX 78217

Recommended Hotel: Estancia del Norte, 37 NE Loop 410 At McCullough, San Antonio, TX 78216

AGENDA & ATTENDEE LIST

Wednesday, September 27, 2023

1:45 pm *Those interested in carpooling, meet in the Estancia del Norte lobby to depart at 1:45 pm.*

2:00 pm **Welcome from LIC and GPM Life**

2:15 pm **Attendee Introductions & Activity Reports**

3:00 pm **How GPM Life Cut Costs, Saved Time, and Increased Speed to Revenue with AgentSync**

GPM Life wanted to more readily meet consumer demands - unfortunately, they realized, they were being held back by inefficiencies in their producer onboarding and license compliance processes. That cost them money from both the internal staff side and through missed business opportunities. In this panel session, subject matter experts Jay Moyer, VP of Marketing from GPM Life; Brandon Nichols, Owner of Solutions3000; and Robby Allen, CRO of AgentSync will share how their partnership met these challenges head on, and resulted in:

- Significantly reduced time to onboard new producers (25% within one week, 59% within two weeks).
- 30% reduction in GPM Life's internal team time spent on producer onboarding tasks.
- GPM Life can now handle larger new contract volume, with its largest partner increasing from 70 to 100 new contracts per month.

(Continued)

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Wednesday, September 27, 2023

4:00 pm **Adjourn for the Day**

6:30 pm **Hosted Networking Dinner Catered by Boudro's**

Wine Cellar at Zinc Bistro, 205 N Presa Street (*carpools leave from hotel lobby at 5:45 pm*)

After dinner, we plan to walk along the Riverwalk to see The Alamo lit up at night, about 0.3 mi from the Bistro.

Thursday, September 28, 2023

8:15 am *Carpools leave from hotel lobby.*

8:30 am **Breakfast Hosted by GPM Life**

9:00 am **Security Operations Presentation by Arctic Wolf**

Arctic Wolf Senior Manager Ben Clark and Concierge Manager Jeff Warling will discuss Arctic Wolf's observations and approach to cyber security, including how its concierge team is helping GPM Life leverage existing tools to improve security outcomes.

10:00 am **Technology Committee Facilitated Discussion**

Topics pre-submitted by participants, including:

- What's on your 3-5 year roadmap?
- Budgeting - approximate breakdown within IT. Are you charging back to business units?
- Working with independent agents: hardware provided, requirements, support
- AI – risks and uses, cost/benefit and knowledge gaps
- Cybersecurity coverage - Anyone starting to self-insure (and/or set up a reserve account)
- Enterprise architecture approach, management, risks (3rd party management) on all business systems.
- Who's using what? Claim payment processing software, online forms, AML checks
- Strategies for interacting with board of directors
- What are some emergent roles in your IT organization? Should they be internal staff or external consultants?

11:30 am **Networking Luncheon – Smoke Shack BBQ – Hosted by GPM Life**

12:30 pm **Meeting Adjourns**

PRELIMINARY ATTENDEE LIST (as of 9/21/2023)

AgentSync - Rachel Norkin, Senior CSM

AgentSync - Robby Allen, Chief Revenue Officer

Allen Bailey and Associates, Inc. - Salem Hildebrandt, Actuarial Consultant

American Fraternal Alliance - Kate Chillinsky, Director of Member Engagement & Communications (Remote)

American Fraternal Alliance - Kendra Ansley, Managing Director (Remote)

American Savings Life Insurance - John Shirts, Chief Financial Officer

American Savings Life Insurance Co. - James Gilbert, Director of IT (Remote)

Arctic Wolf - Jeff Warling, Manager, Concierge Services

Arctic Wolf Networks - Ben Clark, Senior Manager, Security Operations

Balanced Growth Enterprises - Ted Mackenzie, Business Development Executive

BetterLife - Don Nieland, Sr Vice President and Corporate Secretary (Remote)

BetterLife - Jake Illing, Director - Software Development (Remote)

CASO Document Management - Mike Drew, SVP Technology & Operation

Catholic Life Insurance - Christopher Belz, Executive Vice President/Corporate Relations
Catholic Life Insurance - Mike Belz, President and Chief Executive Officer
Catholic Life Insurance - Scott Brant, Senior Vice President, IT
Catholic Life Insurance - Tricia Michalek, Vice President - Operations
Catholic Order of Foresters - Joni Kazmierczak, VP of Operations
Columbian Financial Group - Kelly Klink, Assistant Vice President, Corporate Projects and Customer Service
CSA Fraternal Life - Nick Kosmas, Interim Secretary / Treasurer
ELCO Mutual Life and Annuity - George Seyter, VP CISO (Remote)
ELCO Mutual Life and Annuity - Silvio Rodia, VP/CRO (Remote)
GPM Life - Craig Bourquin, AVP of IT
GPM Life - Gregory Lawler, CIO
GPM Life - Jay Moyer, Vice President - Director of Marketing
GPM Life - Pam Hutchins, Senior Vice President and Chief Actuary
GPM Life - Robert Draper, Vice President - Investments
GPM Life - Tonya Carroll, VP, Customer Experience Officer
GTN - Eric Lambert, Senior Vice President
Heritage Life Insurance Company - Michelle Casaus, Asst VP of Operations
Hermann Sons Life - Jon Thompson, Director of Information Technology
Hermann Sons Life - Samantha Kelley, Vice President of Operations and COO
illustrate inc - Lyndon Edwards, President
iPipeline - Michael Deck, Software Sales Director
iPipeline - Roy Goodart, VP, Product Management
Kemper - Saud Khan, MBA Leadership Rotation
LIC - Audrey Wittenburg, Associate Director
LIC - Dean Lambert, Executive Director
Manage My Limited - Mark Moran, Chief Product Officer
Management Data, Inc. - Jeremy Bourland, Vice President Business Development
Management Research Services, Inc. - Steve DeLonge, Director of Client Success
NSS Life - Al Burns, Chief Information Officer
QLAdmin - Greg Garza, CTO & Director of Software Development
QLAdmin - Kat Correa, Chief Marketing Officer
Slovene National Benefit Society - Terry Champ, Chief Information Officer
Solutions3000 - Brandon Nichols, Owner
SPJST - Brett Wheeler, Senior Accountant (Remote)
SPJST - Roy Vajdak, Controller
Tapp Solutions - Michael Potter, CEO
Trilogy Actuarial Solutions - Amy Phillips, Partner