## Conference Schedule

### Wednesday, March 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:30–5:00 p.m.</td>
<td>Pre-Conference Workshop, Ignite Employee Engagement and Boost Agent Retention</td>
<td>Texas 1</td>
</tr>
<tr>
<td>5:30–7:00 p.m.</td>
<td>Welcome Reception</td>
<td>Texas 2–3</td>
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</tbody>
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### Thursday, March 3

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:00–5:00 p.m.</td>
<td>Registration Desk Open</td>
<td>Texas Foyer</td>
</tr>
<tr>
<td>7:00–8:00 a.m.</td>
<td>Continental Breakfast</td>
<td>Texas 2–3</td>
</tr>
<tr>
<td>8:00–9:30 a.m.</td>
<td>General Session: Service that Rocks, Jim Knight</td>
<td>Texas 1</td>
</tr>
<tr>
<td>9:30–9:45 a.m.</td>
<td>Networking Break</td>
<td>Texas 2–3</td>
</tr>
<tr>
<td>9:45–10:45 a.m.</td>
<td>Concurrent Sessions</td>
<td>Texas 6</td>
</tr>
<tr>
<td></td>
<td>1.1 How to Make the Digital Customer Relationship Seem Human</td>
<td>Texas 6</td>
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<tr>
<td></td>
<td>1.2 Customer Service: Picking the Right Person for the Job</td>
<td>Texas 7</td>
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<tr>
<td></td>
<td>1.3 The Internet of Things, Wearables, and AI: The Future of Customer Experience for Insurance</td>
<td>Texas 1</td>
</tr>
<tr>
<td></td>
<td>1.4 Game On! Learn to Play; Play to Learn</td>
<td>Texas 5</td>
</tr>
<tr>
<td>10:45–11:00 a.m.</td>
<td>Networking Break</td>
<td>Texas 2–3</td>
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<tr>
<td>11:00 a.m.–12:00 p.m.</td>
<td>Concurrent Sessions</td>
<td>Texas 1</td>
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<tr>
<td></td>
<td>2.1 Customer Experience and Life Insurance: Addressing the Nuances of Our Industry</td>
<td>Texas 1</td>
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<tr>
<td></td>
<td>2.2 Do You Have Quality Data?</td>
<td>Texas 7</td>
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<tr>
<td></td>
<td>2.3 Using Stay Interviews to Build Engagement in Your Multi-Generational Workforce</td>
<td>Texas 6</td>
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<td></td>
<td>2.4 Speech Analytics in ACTION</td>
<td>Texas 5</td>
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<tr>
<td>12:00–1:30 p.m.</td>
<td>Lunch and Networking, Sponsored by Captricity</td>
<td>Texas 2–3</td>
</tr>
<tr>
<td>1:30–2:30 p.m.</td>
<td>General Session, LOMA Operations Leaders Roundtable</td>
<td>Texas 1</td>
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<tr>
<td>2:30–2:45 p.m.</td>
<td>Networking Break</td>
<td>Texas 2–3</td>
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<tr>
<td>2:45–3:45 p.m.</td>
<td>Concurrent Sessions</td>
<td>Texas 6</td>
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<tr>
<td></td>
<td>3.1 Total Talent Management — Taking Talent to New Heights</td>
<td>Texas 6</td>
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<tr>
<td></td>
<td>3.2 Are You Listening to Your Customers? Enhancing Customer Experience and Satisfaction through Automated Contact Analytics</td>
<td>Texas 1</td>
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<td>3.3 The Future of Contact Centers — Are You Prepared?</td>
<td>Texas 7</td>
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<td>3.4 Will Your Contact Center Keep Pace with the New Wellness-based Insurance Products?</td>
<td>Texas 5</td>
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<tr>
<td>3:45–4:00 p.m.</td>
<td>Networking Break</td>
<td>Texas 2–3</td>
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<tr>
<td>4:00–5:00 p.m.</td>
<td>General Session, Soar 2 Success, Elizabeth McCormick</td>
<td>Texas 1</td>
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<tr>
<td>5:30–7:00 p.m.</td>
<td>Reception, Sponsored by Cincom</td>
<td>Texas 2–3</td>
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### Friday, March 4

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:00–8:00 a.m.</td>
<td>Continental Breakfast</td>
<td>Texas 2–3</td>
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<tr>
<td>8:00–9:00 a.m.</td>
<td>General Session, The Ultimate Customer Service Experience, Jason Young</td>
<td>Texas 1</td>
</tr>
<tr>
<td>9:00–9:15 a.m.</td>
<td>Networking Break</td>
<td>Texas 2–3</td>
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<tr>
<td>9:15–10:15 a.m.</td>
<td>Concurrent Sessions</td>
<td>Texas 6</td>
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<td></td>
<td>4.1 Enabling Data Driven Insights to Deliver a Better Customer Experience</td>
<td>Texas 6</td>
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<td>4.2 Leadership in Action: An Emerging Leaders Development Program</td>
<td>Texas 7</td>
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<td>4.3 Strategies to Address the Growing Digital Delivery Needs of the Connected Policyholder</td>
<td>Texas 1</td>
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<td>4.4 Transforming the Policyholder Correspondence Process: One Carrier’s Journey</td>
<td>Texas 5</td>
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<tr>
<td>10:15–10:30 a.m.</td>
<td>Networking Break</td>
<td>Texas 2–3</td>
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<tr>
<td>10:30–11:30 a.m.</td>
<td>Concurrent Sessions</td>
<td>Texas 6</td>
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<tr>
<td></td>
<td>5.1 Analyzing Online Behavior to Improve Interactions and Reduce Fraud</td>
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<td>5.2 Scrum: Applying Agile Project Management Concepts to Life Product Development</td>
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<td>5.3 When Your Strategy is “Go Digital” and Your Operations Are “Still Analog”</td>
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<tr>
<td>11:30 a.m.</td>
<td>Adjourn</td>
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Jason Young  
Expert in Workplace Performance, Customer Service, and Leadership  
As a former senior-level manager at Southwest Airlines, Jason learned the value of a successful workplace culture. During his tenure with the airline, Southwest consistently rated No. 1 in customer service and employee satisfaction. Jason was a key driver in creating and developing the company’s innovative training programs for its successful leadership and customer service culture that have become renowned in the business world today.

Elizabeth McCormick,  
Soar 2 Success International, LLC  
Prepare to be inspired! As a U.S. Army Black Hawk pilot, Elizabeth McCormick flew command and control, air assault, peacekeeping, and top-secret intelligence missions — and transported high-level government VIPs. She has translated these extreme experiences into relatable lessons you can put into immediate action. Her personal development book, The P.I.L.O.T. Method; the 5 Elemental Truths to Leading Yourself in Life, is a must read. Elizabeth has also received the Meritorious Service Medal for her excellence in service and was awarded the U.S. Congressional Veteran Commendation for her commitment to serving her country and community as a disabled veteran.

Jim Knight  
Training & Development Expert and former Head of Training and Development for Hard Rock Cafe  
A training and development veteran for 30+ years, Jim Knight facilitates on a variety of interactive topics, including sessions around organizational culture, world-class service, employee engagement, internal branding, and performance management.

Chris Mulligan  
Co-founder & CEO, TalentKeepers  
Christopher Mulligan has over 25 years of experience in the human resources industry, the majority of which has been in the employee engagement, selection, assessment, and retention arena. In 2000, Chris co-founded TalentKeepers, an organization dedicated to the issue of employee engagement and retention. TalentKeepers products have twice been recognized as “Top Training Products of the Year” by Human Resource Executive Magazine for their innovative and effective approach to employee on-boarding, engagement and retention. Chris has worked with organizations around the world on employee engagement and retention issues including Accenture, AT&T, BMW, Coke, EDS, GE, and UPS.

Full speaker biographies can be found at www.loma.org/csc.
9:30–9:45 a.m.
Networking Break
Texas 2–3

9:45–10:45 a.m.
Concurrent Sessions 1.1–1.4

1.1 How to Make the Digital Customer Relationship Seem Human
Texas 6
Traci Perrelli, Product Manager, Intellect SEEC

This session takes a look at how the digital evolution of consumer behavior and advances in technology affect the “sell and service” mentality of our industry. We will explore the effects of the digital evolution that inform today’s changes in lead management, new business, customer service, and claim processing.

You will walk away with a sense of how buzz words like omni channel, digital strategy, customer centric, Big Data, and synergy can be applied in your day-to-day work to improve your systems and overall outcomes.

1.2 Customer Service: Picking the Right Person for the Job
Texas 7
Dr. Valerie A. Bram, Director, T2 UK Ltd.
Dr. Henry A. Fabian, Director, T2 UK Ltd.

It would be great if there were a sure-fire way of recruiting employees who were a perfect fit for your organization! By profiling the personality traits of 1,468 call center agents and matching them with the performance matrices provided by the company, T2 UK was able to identify the psychological makeup and behavioral traits of those who did a perfect job.

Armed with this knowledge, team leaders now know which behaviors to coach across the entire call center, and the company knows which candidates to select in future recruitment drives. Come learn about the Behavioral Profile Questionnaire T2 UK’s clinical psychologists developed through this empirical research.

1.3 The Internet of Things, Wearables, and AI: The Future of Customer Experience for Insurance
Texas 1
Tom Benton
Vice President, Research and Consulting, Novarica

With the rapid advancement and deployment of technologies such as Internet of Things, wearables, and AI, new data is becoming available about consumers and their behavior—data that can be used to assess health and lifestyle related to insurance risk. The ability of technology to not only track but to also respond to consumer behavior will disrupt customer expectations.

How can insurers prepare for the future of customer expectations in this new “digitally immersed” world? Come and find out... and catch a glimpse of a vision for using this technology to create the “insurance customer experience of the future.”
**1.4 Game On! Learn to Play; Play to Learn**

**Texas 5**

**Irene Brank, Director of Operations, Annuity Post Issue Division, MassMutual Insurance Company**

Participants will be exposed to using play as a motivating teaching tool. Specifically, the session will focus on teaching creative thinking/problem solving, driving the understanding of organizational goals, and working together to ensure the best possible customer service experience. Attendees will actually learn concepts through active participation in play.

**10:45–11:00 a.m. Networking Break**

**11:00 a.m.–12:00 p.m. Concurrent Sessions 2.1–2.4**

**2.1 Customer Experience and Life Insurance: Addressing the Nuances of Our Industry**

**Texas 1**

**Todd A. Silverhart, Ph.D., Corporate Vice President and Director, Insurance Research, LIMRA**

LIMRA has developed a framework for the customer experience. It identifies key drivers of customer experience and recognizes the impact of both distributors and the company itself as they apply across key touch points throughout the lifecycle of an insurance policy.

Come hear about LIMRA’s customer experience framework, efforts to develop meaningful metrics, and initial results from a newly-introduced industry benchmarking program.

**2.2 Do You Have Quality Data?**

**Texas 7**

**Melissa Scott, Product Solution Specialist, Life Insurance LexisNexis Risk Solutions**

Identity verification is vital. By identifying the applicant as a real person at point of application and policy administration you reduce fraudulent proposed insured/owners, drive higher hit rates, reduce operational cost, and get better results. This presentation will walk through:

- Application processes and best practices
- Implications of an incomplete process
- Case study examples of data and fraud
- When to implement various data sets within various insurer organizational structures and benefits of each approach
- How data hygiene can be a powerful customer retention tool

**2.3 Using Stay Interviews to Build Engagement in your Multi-Generational Workforce**

**Texas 6**

**Christopher Mulligan, Co-founder & CEO, TalentKeepers**

Stay interviews can be an impactful component in your engagement and retention strategies. But many leaders are reluctant to open the door to a conversation about retention, growth, career opportunity, and employee aspirations. Come learn a straightforward yet powerful approach to help your leaders build confidence and skill with employee conversations that boost commitment, engagement, and retention. Understand how each generation’s work ethic, values, views on relationships, and outlook on life impact their engagement.

**2.4 Speech Analytics in ACTION**

**Texas 5**

**Adrian Guenther, AVP, Lincoln Financial Group Individual Annuity Contact Center**

Speech analytics solutions take your spoken conversations and convert them into text, giving you searchable insights into what’s going on in your contact center. These tools have the power to deliver the voice of your customer (VOC) in ways never before possible. Come learn how one of your industry peers is using speech analytics to change the quality conversation and improve the organization.

You will discover:

- How to get the most out of your new wealth of data
- Ways to use VOC for back office operation improvements as well as in the contact center
- The benefits of shifting from attribute quality to continuous improvement coaching

**12:00–1:30 p.m. Lunch and Networking**

Sponsored by Captricity

**Texas 2–3**

**1:30–2:30 p.m. General Session**

**Texas 1**

**LOMA Operations Leaders Roundtable**

**LOMA Operations Leaders Roundtable –Chair Rhonda R. Fenner, Vice President, Chief Experience Officer Thrivent Financial**

**Rachelle Gagnon CHRP, ACS, MBA, Vice President Administration and Customer Experience, Assumption Mutual Life**

**Michael Heard, FLMI, PE, SVP, Enterprise Operations, CNO Financial Group**

This session will provide a forum for senior-level operations executives of LOMA member companies to discuss ideas and share concerns that relate to objectives and strategic approaches for operational efficiency in the financial services sector.

Look forward to a lively discussion on the issues that shape our current environment and those that will dictate the future of our industry.
3.4 Will Your Contact Center Keep Pace with the New Wellness-based Insurance Products?

Texas 5

David Smith, Vice President, Insurance Transformation and Solutions, IGATE, now part of Capgemini

We are in the first wave of new products integrating wearable health device technology, personal wellness data, premium discount incentives, and rewards for life and health products. We have arrived at “telematics” for humans. Join this discourse on the next product wave and its far-ranging implications. We will close the session by drawing for a Fitbit to help you keep pace.

3:45–4:00 p.m. Networking Break

Texas 2–3

4:00–5:00 p.m. General Session

Texas 1

Soar 2 Success

Elizabeth McCormick

5:30–7:00 p.m. Reception

Sponsored by Cincom

Texas 2–3

Friday, March 4, 2016

7:00–8:00 a.m. Continental Breakfast

Texas 2–3

8:00–9:00 a.m. General Session

Texas 1

The Ultimate Customer Service Experience

Jason Young

9:00–9:15 a.m. Networking Break

Texas 2–3

9:15–10:15 a.m. Concurrent Sessions 4.1–4.4

4.1 Enabling Data Driven Insights to Deliver a Better Customer Experience

Texas 6

Dr. Kuang Chen, Founder and CEO

Captricity

As the volume of customer data insurers ingest continues to grow exponentially each year, so does the opportunity to streamline critical business workflows through analytics. From risk modeling to fast-track underwriting, learn how top life insurers are unlocking new legacy data sources to enhance their sales, marketing, and underwriting.

This presentation will walk through:

- Case studies on new data access initiatives from top ten U.S. life insurers
- How new data sources are being used to enable ‘Fast Track Underwriting’
- How machine learning technologies can better automate data capture
- Why legacy data is a competitive advantage against industry newcomers
**4.2 Leadership in Action: An Emerging Leaders Development Program**

*Texas 7*

**Leah Reckin-Mahoney**, Director, Life New Business & Customer Service, Minnesota Life

**Travis K Ruport**, Supervisor, Individual Life New Business

Securian Financial Group

In today’s ever changing world it is more important than ever to develop a strong leadership team. This session will explore how one company is focusing on developing emerging leaders by encouraging existing associates and exploring talent from outside the organization.

Learn about the process that was created to help attract, retain, and grow talented leaders. It will be an opportunity to hear stories of both successes and challenges on the journey to engage and empower individuals to become our next wave of supervisors and managers.

**4.3 Strategies to Address the Growing Digital Delivery Needs of the Connected Policyholder**

*Texas 1*

**Chris Johnson**, Vice President and General Manager, Inlet LLC

In today’s omni channel world, policyholders are in control of more information than ever but are frustrated that they cannot obtain all of their content instantly via their channel of choice. With more and more policyholders living fully digital lives, it’s time for their content to be accessible online, whenever and wherever they want.

eDelivery is evolving. But what about the challenges that carriers face? This session will give you a roadmap to use along the journey to meeting the digital demands of your policyowners.

**4.4 Transforming the Policyholder Correspondence Process: One Carrier’s Journey**

*Texas 5*

**Dawn Hunter**, Communications Consultant

Nationwide Financial

Learn how one carrier’s business units and IT partnered on a communication journey to inventory, analyze, rewrite, and implement a new customer correspondence system under a centralized governance model, enabling technology from intake to output. The new model is saving money, managing risk, offering faster speed to market, and having an immeasurable positive impact on the customer experience.

**10:15–10:30 a.m. Networking Break**

*Texas 2–3*

10:30–11:30 a.m. Concurrent Sessions

**5.1 Analyzing Online Behavior to Improve Interactions and Reduce Fraud**

*Texas 6*

**Kym Gully**, Technology Lead

Accenture Life and Annuity Software

We live in an online and mobile world. Through those types of interactions, customers form a positive or negative opinion of a carrier—often before they have a live interaction with your representative. That’s why Web analytics is more important than ever. The ability to record, retrieve, and analyze Web and mobile interactions can be a major factor in improving customer satisfaction.

Accenture Software and Clarisite have teamed up to offer Web Recording and Replay. The SaaS solution allows your service representatives to see exactly what customers encountered, speeding resolution and handling time. Come to this session to learn more about it!

**5.2 Scrum: Applying Agile Project Management Concepts to Life Product Development**

*Texas 7*

**Annette Brommel**, Senior IT Analyst

The Principal Financial Group

**Dodd Starbird**, Principal Managing Partner

Implementation Partners

Agile Project Management (Scrum) is an exciting new approach to leading projects. The approach emphasizes disciplined speed and flexibility in place of exhaustive planning, and it’s being adopted in information technology (IT) groups across the world, allowing them to deliver critical requirements more quickly, prioritize efforts better, and integrate with the business (their customers!) throughout the development process.

But Agile can be used for more than just IT programming! This session will give you an overview of Agile Project Management and then tell the story of how a team at The Principal Financial Group applied Agile concepts to its product development process.

**5.3 When Your Strategy is “Go Digital” and Your Operations Are “Still Analog”**

*Texas 1*

**Ernst Renner**, Managing Partner, NEOS

This presentation discusses impacts to process and operations for companies adopting a digital transformation, along with ways to use new capabilities to create a more customer-centric strategy. The presentation will also walk through a maturity model that companies can use to assess where they are in the digital evolution and prioritize where they need to go next.

**11:30 a.m. Adjourn**
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**Location Map**