



Strategies for Innovation at Smaller Companies



LIC Technology Committee Meeting (Virtual)

Via Webex | Wednesday, October 20, 2021, 10 am - 3 pm EDT | www.loma.org/LICTECH

PRELIMINARY AGENDA

Please review our [Antitrust Policy](#)

Check In Early! The meeting room will open at 9:30 1m EDT so you can check your mic and join in pre-meeting conversation.

10:00 a.m. ET **Attendee Introductions**

Hear what’s going on at other companies and discuss current challenges.

11:00 a.m. **The Future of Work**

Robert McIsaac, FLMI, LLIF, Head of Life, Annuities and Benefits, Aite-Novarica Group

One of the realities of the COVID-19 era is that the pandemic has fundamentally altered how many organizations have worked over the past 18+ months. Looking into the future, we now see with increasing clarity that we are not going to be returning to what we experienced as recently as 2019. Since then, many organizations have found that labor markets have shifted, digitization and virtualization have accelerated transformation in sales and support models, and we have driven much deeper into a significant generational transition. During this session, we’ll explore issues that companies need to consider addressing as we move toward the final stages of the pandemic and into an environment that is likely to be characterized by faster cycle times and increased competition at many levels. As William Gibson noted, the “future has already arrived...it just isn’t evenly distributed.”

12:00 p.m. **Break**

1:00 p.m. **Facilitated Discussion with Live Polling**

Technology executives from smaller companies tend to have unique challenges and opportunities. Here’s a chance to learn from each other: what’s working and what isn’t, who’s doing what, and practical solutions to shared problems. Topics will be pre-submitted by participants, such as:

- Top cyber-related initiatives, and internal or outsourced cyber team?
- Top digitization-related initiatives
- Subscription or perpetual licensing models for core systems
- Size of IT staff relative to Home Office employees and revenue
- Percent of time IT spends supporting core systems (maintenance, upgrades) vs. new value-add development

3:00 p.m. **Adjourn**

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SAMPLE ATTENDEE LIST

From the last LIC Tech Meeting

Allen Bailey & Associates: Tom Wurfel, Consulting Actuary
American Savings Life Insurance Co.: James Gilbert, Director of IT
BetterLife: Wayne Boddicker, Director, Programming
Catholic Life Insurance: Scott Brant, FLMI, ACS, AAPS, AIAA, AIRC, ARA, Senior Vice President, IT
Catholic Order of Foresters: Joni Kazmierczak, VP of Business Analysis and IT
Cincom Systems: Angie Ingram, Senior Account Executive
Columbian Financial Group: Greg Sim, FLMI, CIO
CSA Fraternal Life: Nick Kosmas, IT Director
Delta Life Insurance Company: Larry Keen, FLMI, ACS, AIAA, Information Technology Manager
Ebix, Inc.: Jeff Hasty, FLMI, ACS, VP Exchange Strategic Business Development
ELCO Mutual Life and Annuity: Roger Grum, VP
ELCO Mutual Life and Annuity: Shelly Grisar, ALMI, ACS, Project Coordinator
Equisoft: Jose Quiroz, Partnerships Manager
Equisoft: Michael Zelesnik, Vp, Insurance Advisory
Gleaner Life Insurance Society: Arell Chapman, CRISC, FLMI, Senior Vice President, Chief Operations & Technical Officer
Gleaner Life Insurance Society: Judy Lawrence, FLMI, ACS, Assistant Vice President - IT Development and Processing
Gleaner Life Insurance Society: Michelle Zimmanck, FLMI, AAPA, ACS, OCSA, OCWA, BPMs, IT Supervisor
Gleaner Life Insurance Society: Nikki Carson, MA, FLMI, ACS, AIAA, CSA, AIRC, ARA, Senior Systems Analyst
GPM Life Insurance: Gregory Lawler, CDR/USN (Ret.), MBA, FLMI, CIO
GPM Life Insurance: Jeff Shaver, Marketing Technologist Manager
Homesteaders Life Co.: Jeff Shepherd, Director, Project Management
Homesteaders Life Company: Claire Struthers, PMP, Project Manager
Homesteaders Life Company: Kim Medici Shelquist, FLMI, Senior VP-Planning & Development
Homesteaders Life Company: Nick Gerhart, EVP-Chief Innovation Officer
illustrate inc: Eric Swanson, VP of Sales
Individual Assurance Company: Callie Broughton, Project Manager
iPipeline: Chris Nichols, EVP, Research & Development
iPipeline: Jeremy Bourland, Director Sales
Liberty Bankers Insurance Group: Dave Kessler, ALMI, Sr. VP of Technology
Management Research Services, Inc.: Matt Whitton, Director of Product
Management Research Services, Inc.: Tim Dineen, Chief Executive Officer
Management Research Services: Josh Dixon, Product Owner
Parkway Advisors: Theron Holladay, CFA, President
Patriot Life Insurance: Marty Dinehart, FLMI, Executive Vice President and COO
Polish Falcons of America: Tim Kuzma, President and CEO
Pulse Logic: Ken Cochrane, Managing Director
Puritan Life Insurance Company of America: Megan Duty, MSIM, PMP, Vice President
QLAdmin Solutions: Greg Garza, CTO & Director of Software Development
ReMark: Steve Gaertner, SVP, Distribution Strategies
SPJST: Roy Vajdak, CPA, Attorney, Controller
Texas Service Life Insurance Company: Chris Canada, CIO
Texas Service Life Insurance Company: Susan Thomas, CEO
The Baltimore Life Companies: Kim Ashby, ACS, AVP Business Analysis and Quality Assurance
thinktum inc: Jenn McLean, AVP Operations
thinktum inc: Tom Murphy, AVP, Technology Delivery
Trilogy Actuarial Solutions: Douglas Brown, ASA, MAAA, Founding Partner
Trilogy Actuarial Solutions: Joshua Gerdes, ASA, MAAA, Founding Partner
United Home Life/Indiana Farm Bureau Insurance: Melinda Grubb, Manager