



Shared Challenges and Opportunities for Smaller Companies



LIC Operations Committee Conference Call

Via Webex | March 24, 2022, 2-3:30pm Eastern | www.loma.org/LICOPS

PRELIMINARY AGENDA

Please review our [Antitrust Policy](#)

Check In Early! The meeting room will open at 1:45 pm EDT so you can check your audio. If you need assistance, contact Audrey Wittenburg via text at (703) 975-5626.

I. Welcome & Introductions

II. Facilitated Discussion with Live Polling

Operations executives from smaller companies tend to wear multiple hats and face unique challenges. Here's an opportunity 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 selected by participants, such as:

- How do others balance growth and development opportunities for employees of small organizations?
- How are members engaged to maintain their personal information (contact, beneficiary)?
- How are marketing budgets determined? How are donations obtained for prizes? What limit is placed on swag?
- Labor shortage
- Customer Service Reps - incentive programs
- Customer Service Reps - training programs
- What innovation is key for your operations?
- What's the future of Insurance Operations?
- How much time do insurance ops spend on manual processes vs. development?

III. Adjourn

After the Meeting

Meeting handouts, including slides, polling results, recordings, and the final Attendee List, will be distributed in the LIC Operations Online Community at www.loma.org/LICConnect. Nonmember attendees will have 7 days' complimentary guest access to download the files and check out this member resource. We encourage you to continue the Q&A with your Operations peers there!

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PRELIMINARY ATTENDEE LIST

AFBA - Monique Easley, Vice President Operations
AFBA - Rita Klein, Director Operations and Innovation Technology
American Fraternal Alliance - Elizabeth Patel, Advocacy and membership manager
American Savings Life Insurance Company - Mike Frahm, Vice President
American Savings Life Insurance Company - Paul Whetten, EVP/COO
Boston Mutual Life Insurance Company - Jen Helms, Executive Vice President - Customer Experience, Innovation, Projects and Technology
Breathe Life - Patrick Viau, Chief Client Officer
Catholic Life Insurance - Tricia Michalek, Vice President - Operations
Catholic Order of Foresters - Joni Kazmierczak, VP of Business Analysis and IT
Columbian Financial Group - Kelly Klink, Assistant Vice President, Corporate Projects and Customer Service
Cyrus Life Insurance Company - Kirk Babb, President
ELCO - James Huitt, Assistant Vice President
ELCO Mutual - Danielle Ruiz, Asst. Vice President of Claims
ELCO Mutual Life and Annuity - Jeff Rasmus, Chief Compliance Officer
ELCO Mutual Life and Annuity - Lori Lemme, Vice President of HR
Farm Bureau of Michigan - Amy Poglese, Life Operations Supervisor
FCSLA Life - Paul Smithers, National Sales Manager
iPipeline - Joe Paddock, Vice President, Sales
KSKJ Life - Lauren Rainey, Director of Operations
Liberty Bankers Insurance Group - Michelle Clements, Senior Vice President
LIC - Audrey Wittenburg, Associate Director
LIC - Jeff Shaw, Executive Director
LIDP Consulting Services - Matt Segreti, Chief Technology Officer & VP of Product Development
LIMRA - Dararith Ly, Director of Business Development, Commercial Research
MRS - Brenda Larson, Director of Life Strategy & Innovation
MRS - GG ONCEL, Head of Customer Strategy & Growth
MRS - Steve DeLonge, Director of Client Success
Nassau - Sue Zophy, Chief Service Officer
Pekin Life Insurance Company - Eric Shane, VP of Life Underwriting
Puritan Life insurance Company of America - Heather Miller, Sr. Business Analyst
Security National Life - Jon Meredith, Director of Policy Administration
Teachers Life - Kayte Fredrickson, President & CEO
Texas Service Life Ins. Co. - Casey Hughes, Chief Operating Officer
thinktum - Eugene Shafronsky, Head of Strategy
thinktum - Jenn McLean, VP Operations
Toronto Police Widows and Orphans Fund - Sylvi Karr, CEO and President
Woman's Life Insurance Society - Vickie Fournier, Director of Member Service