

Shared Challenges and Opportunities for Smaller Companies



LIC Operations Committee Meeting

Hosted by Baltimore Life | Owings Mills MD | September 24-25, 2024 | www.loma.org/LICOPS



Meeting Location: Baltimore Life, 10075 Red Run Boulevard, Owings Mills, MD 21117-4871
Recommended Hotel: Marriott Owings Mills Metro Centre, 10101 Grand Central Ave, Owings Mills, MD 21117

AGENDA & EARLYBIRD ATTENDEE LIST

Tuesday, September 24, 2024

- 2:00 pm **Welcoming Remarks, Attendee Introductions/Activity Reports**
Dave Ficca, CEO and President, Baltimore Life and Dean Lambert, Executive Director, LIC
- 3:00 pm **Operations & Innovation:**
Harnessing Internal Assets to Increase Revenue as the Result of Innovation and Operational Planning
Tim Heaton, Managing Member, Heaton Consulting; Mark Rothwell, President, The Brand Matters; and Chris Downs, Vice President, Client Delivery, New Resources Consulting
Technology and customer expectations are continually evolving. Understand how to improve decision-making and outcomes when pursuing large operational investments. The presenters will also provide a project charter template and highlight key take-aways related to business justification, measurable objectives, resource planning, stakeholder roles and corporate governance. The use of a charter is typically used with an IT project but has broader uses and can be scaled for any transformative change. *This presentation qualifies for one Professional Development Unit for the Project Management Institute.*
- 4:00 pm **Adjourn for the Day**
- 6:30 pm **Hosted Networking Dinner** – The Grill at Harryman House, 340 Main Street, Reisterstown MD

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Wednesday, September 25, 2024

8:30 am **Continental Breakfast Hosted by Baltimore Life**

9:00 am **Strategic and Holistic Approach to Operational Improvement**

Jason Bordui, President & Founder, Balanced Growth Consulting

Joni Kazmierczak, VP of Operations, Catholic Order of Foresters

This session will cover aligning operational strategy to the business strategy, provide an overview of a holistic approach to operations improvement for core insurance processing, and work through an interactive exercise to apply the holistic approach to the claims process.

10:15 am **Facilitated Discussion**

Topics pre-submitted by participants, including:

- Expected top three priorities for 2025
- Beneficiary and Policy Change Form Requirements
- Do you allow agents to pre-fill forms?
- Threshold for requiring a certified copy of death certificate
- Unnatural deaths: what do you accept as proof that a beneficiary was not involved in the death? (Slayer Statute)
- Does anyone belong to ICA?
- SLAs for New Business, Underwriting, Service, Claims
- Avg length of service of employees in New Business, Underwriting, Service, Claims
- Percentage of service requests via channel (chat, email, portal, call, mails, fax, etc.)
- Front-line team members in operations: How can we hire and instill the expertise we need in a position with high turnover?

11:30 am **Networking Luncheon Hosted by Baltimore Life**

12:30 pm **Meeting Adjourns**

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LIC OPERATIONS COMMITTEE MEETING

EARLYBIRD ATTENDEE LIST (9/3/2024)

American Savings Life Insurance Company - Paul Whetten, EVP/COO

Catholic Life Insurance - Tricia Michalek, VP, Operations (Remote)

Catholic Life Insurance - Zachary Trevino, Director of Process Improvement (Remote)

Catholic Order of Foresters - Joni Kazmierczak, VP of Operations

CSA Fraternal Life - Nick Kosmas, Secretary / Treasurer

Cyrus Life Insurance Company - Chris Meredith, Chief Business Development Officer, Cyrus Works

Cyrus Life Insurance Company - Donna Merriweather, Chief Human Resources Officer, Cyrus Works

Cyrus Life Insurance Company - Jody Guffey, Office Manager, Cyrus Life Insurance Company

GPM Life Insurance Company - Tonya Carroll, VP, Customer Experience Officer (Remote)

Heaton Consulting LLC - Tim Heaton, Managing Member

Life Insurers Council - Dean Lambert, Executive Director

LIMRA and LOMA - Andrew Franks, Member Relations Director

National Farm Life - Corey Hunter, Assistant Vice President Operations

New Resources Consulting - Chris Downs, Vice President, Client Delivery

QLAdmin Solutions - Kat Correa, Chief Marketing Officer

Royal Neighbors of America - Matt Stoefen, CSC Director

Solutions 3000 - Toni Schuster, Owner

Solutions3000 - Brandon Nichols, Owner

SWBC Life Insurance Company - Melissa Piehl, Director, PPI Claims

The Brand Matters - Mark Rothwell, President