

LIC TECHNOLOGY COMMITTEE

# Tech and Ops – Inextricably Intertwined



Hosted By:

PuritanLife &  benekiva

At the Desert Botanical Garden, Phoenix | October 2-3, 2024 | [www.loma.org/LICTECH](http://www.loma.org/LICTECH)

## AGENDA & ADVANCE ATTENDEE LIST

### Wednesday, October 2, 2024

2:00 pm MT **Welcome & Attendee Introductions**

*Desert Botanical Garden – Webster Auditorium*

*1202 N Galvin Pkwy, Phoenix, AZ 85008 (Carpools leave Marriott 1:25 p.m.)*

Introduce yourself and get to know your fellow IT execs. Hear what's going on at everyone's companies in a lightning round of tech wins or misses.

3:00 pm MT **Benekiva Workshop: Mini Lean Process Eval**

Bobbie Shrivastav, PMP, CSP, CSM, PMI-ACP, Co-Founder and Chief Operations Officer, Benekiva

3:45 pm MT **COO and CTO Panel: Tech and Ops, Inextricably Intertwined**

Bobbie Shrivastav, PMP, CSP, CSM, PMI-ACP, Co-Founder and Chief Operations Officer, Benekiva (Moderator)

John Sugar, Advisor, JDS Advisory Services

Megan Duty, MSIM, PMP, Sr Vice President, Puritan Life

Dierdre Woodruff, Sr. Vice President, Puritan Life

Chris Campbell, CEO, BetterLife

4:30 pm MT **Adjourn for the Day**

5:30 pm MT **Happy Hour in Old Town Scottsdale – Sponsored by InsurTech NY**

*Olive & Ivy, 7135 E. Camelback Rd. Suite 195, Scottsdale, AZ (10 minute walk from Marriott)*

7:00 pm MT **Hosted Networking Dinner in Old Town Scottsdale**

*Barrio Queen, 7114 E Stetson Dr Suite 105, Scottsdale, AZ 85251 (2 minute walk from Olive & Ivy)*

### ADDITIONAL SPONSORS



## Thursday, October 3, 2024

7: :30 am MT **Puritan Life Open House – Come and Go Breakfast**

*Puritan Life, 7272 E Indian School Rd, Suite 100, Scottsdale, AZ 85251*

*(4 minute walk from Marriott. Carpools will leave about 8:30 a.m. for the Desert Botanical Garden)*

Open house style event: Attendees can come and go between 7:30 and 8:15 am to grab breakfast, take a quick (5-minute) tour, get some swag, and then head over to the Garden in groups when ready.

9:00 am MT **Tech Think Tank (Q&A)**

*Desert Botanical Garden, 1202 N Galvin Pkwy, Phoenix, AZ 85008*

Bobbie Shrivastav, PMP, CSP, CSM, PMI-ACP, Co-Founder and Chief Operations Officer, Benekiva (Moderator)

9:45 am MT **Digital Tools for Insurance: What's Next for Tech**

Jeffery Williams, Director, Insurance Industry Advisor, Worldwide Financial Services, Microsoft

10:30 am MT **Networking Break**

An opportunity to enjoy specialty iced drinks and “grow your network in the garden!”

11:15 am MT **LIC Member Technology Needs Survey 2024 - Equisoft**

12:00 pm MT **How To Be a Good Partner**

Jeffery Williams, Director, Insurance Industry Advisor, Worldwide Financial Services, Microsoft

Laurel Jordan, LSSGB, TPA Insurance Officer & Solutions Lead, Sutherland

Megan Duty, MSIM, PMP, Sr Vice President, Puritan Life

Bobbie Shrivastav, PMP, CSP, CSM, PMI-ACP, Co-Founder and Chief Operations Officer, Benekiva

Panel discussion on best practices to be a good partner, featuring perspectives from a vendor, insurtech, carrier, and TPA.

12:45 pm MT **Networking Luncheon Hosted by Benekiva**

*[Gertrude's Restaurant](#) at the Desert Botanical Garden*

1:45 pm MT **Adjourn—Open Time to enjoy the [Desert Botanical Garden!](#)**



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## ADVANCE ATTENDEE LIST

(as of 9/27/2024)

AAA Life Insurance Company - Michael Vellat, SVP, COO  
American Savings Life - Byron Allen, President/CEO  
American Savings Life Insurance Co - Steve Herland, CIO  
Benekiva - Bobbie Shrivastav, PMP, CSP, CSM, PMI-ACP, Co-Founder and Chief Operations Officer  
Benekiva - James Preston, Sr. National Account Executive  
BetterLife - Chris Campbell, CEO  
Catholic Life Insurance - Scott Brant, FLMI, SVP/Information Technology  
Catholic Life Insurance - Tricia Michalek, FLMI, ACS, ARA, VP, Operations  
Catholic Life Insurance - Zachary Trevino, FLMI, ALMI, ACS, ARA, Director of Process Improvement (REMOTE)  
CSA Fraternal Life - Nick Kosmas, Secretary / Treasurer  
Emtech Group - Jeff Koval, Senior Sales Executive  
Gleaner Life Insurance Society - Arell Chapman, CRISC, FLMI, Chief Operations and Compliance Officer  
Gleaner Life Insurance Society - Jenni Keister, Supervisor, IT Operations (REMOTE)  
Gleaner Life Insurance Society - Michelle Zimmanck, FLMI, AAPA, ACS, OCSA, OCWA, BPMs, Assistant Vice President, IT Operations (REMOTE)  
GTN - Lambo Lambert, Senior Vice President  
Illustrate inc - Lyndon Edwards, President (REMOTE)  
InsurTech NY - Tony Lew, Managing Director  
iPipeline - America Sass, Customer Success Manager  
iPipeline - Christian Cooper, Director, Sales  
JDS Advisory Services - John Sugar, Advisor  
Lavvi - Miguel Ceron, ALMI, ACS, ARA, Account Executive  
Lavvi - Ray Adamson, Chief Customer Officer  
Liberty Bankers Insurance Group - Dave Kessler, ALMI, Sr. Vice President, Technology  
Microsoft - Jeff Williams, Digital Insurance Leader  
Puritan Life Insurance Company of America - Dierdre Woodruff, Sr. Vice President  
Puritan Life Insurance Company of America - Dylan Barton, Senior Engineer  
Puritan Life Insurance Company of America - Heather Miller, VP - Operations  
Puritan Life Insurance Company of America - John Meister, VP - Technology  
Puritan Life Insurance Company of America - Kyle Kryza, Software Engineer  
Puritan Life Insurance Company of America - Meg Duty, MSIM, PMP, Sr Vice President  
Puritan Life Insurance Company of America - Tristan Hinze, Business Analyst  
QLAdmin Solutions - Greg Garza, CTO  
QLAdmin Solutions - Kat Correa, MBA, FLMI, Chief Marketing Officer  
SPJST - Roy Vajdak, CPA, Attorney, Controller  
Sutherland - Laurel Jordan, LSSGB, TPA Insurance Officer & Solutions Lead  
X by 2 - Sudhar Krishnamachary, CCXP, Insurance Market Leader