

LIC OPERATIONS AND TECHNOLOGY SUMMIT

Strategies and Shared Insights
for Operational Excellence



LIC Operations and Technology Summit
Hosted by Equisoft | Montreal | May 11 – 13, 2026

PRELIMINARY AGENDA

Monday, May 11, 2026

- 2:00 pm **Welcome & Attendee Introductions/Activity Reports**
Learn what's going on at the other companies represented at the meeting — including key initiatives, current challenges, and latest news — to facilitate networking with your industry peers.
- 3:00 pm **Networking Break**
- 3:30 pm **Equisoft Case Study Workshop Part 1**
- 4:30 pm **From Legacy to Limitless: Leading Change at the Intersection of Technology & Operations**
Emily White, Chief Operations Officer, Insuratec
Tabitha Evans, Chief Technology Officer, Insuratec
In this discussion, we will explore how life insurance organizations can move from legacy systems and siloed processes to modern, integrated technology and operations ecosystems. While new technology often drives transformation, lasting success depends on effective change management that aligns people, processes, and platforms across the organization.
We will discuss practical strategies for leading change across both technology and operations, breaking down legacy thinking, and preparing teams to adopt new systems and ways of working. Attendees will gain insights into guiding organizations toward a more agile, scalable, and future-ready operating model while maintaining stability, compliance, and operational continuity.
- 5:30 pm **Adjourn for the Day**
- 6:30 pm **Hosted Networking Dinner**

Tuesday, May 12, 2026

- 8:00 am **Continental Breakfast Hosted by Equisoft**
- 8:30 am **Equisoft Case Study Workshop Part 2**
- 9:30 am **Better Together, The Tech + Ops Partnership Model That Powers Modern Insurance**
Megan Duty, Senior Vice President, Puritan Life
Modern insurers are under constant pressure to deliver faster, operate more efficiently, and adapt quickly to changing customer and regulatory expectations. Achieving this requires more than strong technology or strong operations alone—it requires a true partnership between the two.
In this session, we'll explore a practical model for how technology and operations teams can work better together to drive organizational success by:

- Understanding company differentiators, prioritizing what truly matters, and directing energy toward initiatives that create real value
- Cross-pollinating skills, knowledge, and perspectives between teams to foster shared education and collaboration
- Cultivating a fail-fast mindset, paired with continuous feedback (and quick response)
- Integrating flexible design and build approaches that ensure systems are usable, scalable, and future focused

Participants will leave with practical strategies to strengthen the Tech + Ops partnership, accelerate innovation, and build a more resilient and responsive insurance organization.

- 10:30 am **Networking Break**
- 11:00 am **Tech Management: Vendor Assessment Templates and Processes**
- 12:00 pm **Networking Luncheon Hosted by Equisoft**
- 1:00 pm **Outing/Tour of Montreal**
- 6:30 pm **Hosted Networking Dinner**

Wednesday, May 13, 2026

- 8:30 am **Continental Breakfast Hosted by Equisoft**
- 9:00 am **Customer Service Efficiency through Technology (administrative platforms, processes, customer management systems/portals)**
Presenter TBA
- 10:00 am **Networking Break**
- 10:30 am **Tech and Ops Staffing – Labor Pool and strategies for smaller companies**
- 11:30 am **Networking Luncheon Hosted by Equisoft**
- 12:30 pm **Adjourn**