

FINEOS Global Summit 2015  
Agenda**Monday, November 2****North American Customer Advisory Group Meeting**

2:00 – 4:30 PM

Hirshhorn



The North American customer advisory groups (CAG) will meet to discuss current projects and bring questions and feedback to FINEOS management. The meeting is by-invitation only. If you are interested in joining the NA CAG, please email [info@FINEOS.com](mailto:info@FINEOS.com) and we will point you in the right direction.

**Opening Welcome Reception**

6:00 – 7:30 PM

The Capitol Room

Let us welcome you to the 9<sup>th</sup> annual FINEOS Global Summit during a reception on the main floor of the Mandarin Oriental (just to the left of the main hotel lobby). Here you can register and receive your welcome packet, then join us for food, refreshments and live music while networking with FINEOS staff and Summit attendees.

**Tuesday, November 3****Summit Keynote:****High-Tech, High-Touch Customer Service**

Micah Solomon

8:20 – 9:15 AM

Oriental Ballroom



Based on Micah Solomon's latest bestseller, Micah will discuss how to build customers for life in this age of social media, self-service, global competition, and endless distractions. Includes hands-on experience, best practices, and culture-building insight from Apple, Google, The Ritz-Carlton, Zappos, USAA Insurance, Four Seasons, and more.

**Micah Solomon** is one of the most popular keynote speakers on customer service, the customer experience, customer loyalty, and corporate culture. A bestselling author and hands-on consultant, Micah Solomon specializes in building stellar, profitable customer experiences and customer-centric corporate cultures, as well as helping organizations provide service to customers of all ages, including the new Millennial (Gen-Y) generation of customers.

## **FINEOS Strategy Update with Innovation & Excellence Awards Presentation**

Michael Kelly, CEO, FINEOS; Anne Anderson, Ambassador of Ireland to the United States

9:15 – 10:15 AM

Oriental Ballroom



Hear about the current FINEOS strategy, results of our annual customer survey, and our vision for the future. Winner of our annual Innovation & Excellence Award will also be announced in this session and given out by our guest of honor, Ambassador of Ireland to the United States of America, Anne Anderson.

## **Back Office Systems Transformation: A Balanced, Customer-centric Approach**

Chuck Johnston, CMO, FINEOS

10:30 – 11:15 AM

Oriental Ballroom

The Life, Accident and Health market continues to rapidly evolve as benefit providers stretch existing processes and systems to support new customer service expectations and care needs. Modern omni-channel service strategies have moved past reactive self-service to proactive service functions using predictive models, which cannot be supported by the providers existing back office systems. Providers are at risk of losing their ability to meet the service expectations of the new consumer.

In this session, we will discuss customer-centric “Roles and Goals” based strategies to help providers plan a deliberate back office transformation that supports proactive omni-channel strategies and provides less risk than “Big Bang” transformation strategies and more strategic value than last generation legacy system wrapper-ing approaches.

## **FINEOS Product Strategy**

Jonathan Boylan, CTO, FINEOS; Eoin Kirwan, VP of Product Management, FINEOS

11:15 – 12:15 PM

Oriental Ballroom

FINEOS has increased the scale of its ambition and commitment to improving the performance of its customers’ core administration and customer service operations. In this session, Jonathan and Eoin will explain the product expansion strategy, sharing the thinking behind the current and planned advances in both technology and in business capabilities.

## **Lunch**

12:15 – 1:15 PM

The Capitol Room

## **FINEOS Customer Success Story**

Customer to be announced at Summit

1:15 – 2:00 PM

Oriental Ballroom

Winner of the 2015 FINEOS Innovation & Excellence award, to be announced at the Summit, will present their winning case study and best practices.

## **FINEOS Claims Roadmap Update**

Adam Dunne, Product Manager, FINEOS; Maria Parker, Claims Product Manager, FINEOS  
2:00 – 3:00 PM  
Oriental Ballroom

As with every year, new features added to FINEOS Claims and the FINEOS Digital Platform can improve the performance and success of your claims operations. Learn about new capabilities in areas such as User Experience, Dashboards, Workflow, CRM, Analytics and Viewpoints as well as added lines of business such as Accident Insurance and Health Indemnity. The FINEOS team will also share the current areas of research that will bear fruit in future releases.

## **CIO Panel Discussion: Driving Innovation in the Life, Accident and Health Industry**

Moderated by Chuck Johnston, CMO, FINEOS  
3:15 – 4:15 PM  
Oriental Ballroom

The Chief Information Officer leads the charge in driving innovation and meeting company goals through the use of technology. CIO's from FINEOS customers will engage in a moderated discussion of the top challenges they are seeing in the industry today, experience they have had within their organization in seeking innovative solutions, and where they see the most opportunity for technology to drive improvement in the industry going forward.

## **The Customer Imperative - Digitizing the Back Office in the Benefits Market**

Jim Quick, Partner in PwC's Advisory Practice  
4:15 – 5:00 PM  
Oriental Ballroom



Market trends continue to shape the traditional Group and Voluntary markets and moving toward a converging benefits market, where there is an opportunity for carriers to reestablish the value proposition for their multiple customers. In this evolving environment, carriers are looking to find ways to innovate across product, distribution, and the service experience, while creating operation agility. As a result, carriers are looking to modernize their platforms to digitize the back office and integrating it into the service experience.

**Jim Quick** is a Partner in PwC's Advisory practice specializing in the Financial Services sector with a primary focus on Insurance companies. He previously spent time at Diamond Management & Technology Consultants and PwC Consulting/IBM. Jim has experience across all Insurance sectors (Group/Voluntary Benefits, Life/Annuities, and P&C) as well as across Financial Services focused on solving Distribution, Customer, Operational, Informational, and Technology challenges.

## **Tuesday Evening Special Event**

Buses depart from Maine Avenue lobby on ballroom level at **5:45 PM**



Tuesday night's special event begins with an after-hours private tour of the U.S. Capitol Building, given to our group by a former member of Congress. Following the tour, we will host a private dinner reception at the beautiful Sequoia Restaurant, located on the banks of the Potomac River. Attire for this evening's event is business casual. Please be at the Maine Avenue entrance (*downstairs on the Ballroom Level - not the main entrance*) at 5:45. Buses will load at 5:45 and will all depart promptly at 6.

**Wednesday, November 4**

### **Health Insurance Exchanges - An Individual's Perspective**

Drew King, SVP, Gen Re North America Life & Health

8:30 – 9:30 AM

Oriental Ballroom



In early 2015, Gen Re released the results of a new survey conducted to learn more about individual consumers' perspectives and opinions on health insurance exchanges, both public and private. Drew will share the key learnings and insights from this research, including how consumers will educate themselves, how exchanges will impact the employer/employee relationship, and consumers' willingness to purchase both health and other benefits through an exchange.

**Drew King** is a Senior Vice President for Gen Re's North America Life & Health division. He is responsible for Group Life, Group Disability, Individual Disability and Medicare Supplement reinsurance products and services. Drew also serves as Chief Marketing Officer for all life and health products in the North American market.

### **Optimize your FINEOS Investment: Expert Tips for Getting the Most out of Your Solution**

Guy McClintock, Solution Architecture Team Lead; Fergal Heffernan, Customer

Engagement Manager

9:30 – 10:15 PM

Oriental Ballroom

With tens of thousands of man days invested in FINEOS Claims and FINEOS Digital Platform to date, there are a wealth of high value features contained within your FINEOS investment. Existing capabilities can be leveraged to solve adjacent business problems, or to bring additional business units onto the FINEOS platform. In addition we work closely with our 50+ customers, to create artefacts and processes that help to identify opportunities for getting the most out of the FINEOS solution in your environment. This session will focus on optimizing your investment with FINEOS and realizing the wide set of benefits that FINEOS can offer.

### **FINEOS Claims: Omni-Channel Customer Service**

Simon Bolster, Principal Sales Consultant, FINEOS

10:45 – 11:15AM

Consumers – and businesses – have become accustomed to interacting via any and all communication mechanisms. The distinction between communication channels is becoming blurred, and perhaps even irrelevant. Today, support for your customer's preferred communication channel is simply expected. Join this session to learn how FINEOS Omni-Channel Customer Service has evolved to meet current (and future) customer expectations, and how FINEOS can support you as you reimagine how to efficiently and effectively engage with your customers through every stage of your relationship.

### **The Transformative Journey to Record Client Satisfaction at TAC**

Janet Dore, Former CEO of Transport Accident Commission

11:15 – 12:00 AM

Hear from former Transport Accident Commission CEO, Janet Dore, on how TAC worked with FINEOS to achieve a 10% increase in client satisfaction AND improved profits by 120%.

## **Lunch**

12:00 – 1:00 PM  
The Capitol Room

## **FINEOS Billing and Policy**

Mike Learned, Senior Product Manager, FINEOS; James Hehir, Product Manager, FINEOS  
1:15 – 2:00 PM  
Oriental Ballroom

FINEOS Billing was launched to the market in June 2015. FINEOS Policy launches in early 2016. Both new products share the FINEOS Digital Platform with FINEOS Claims. In this session, the FINEOS product team will take a “show and tell” approach to explain the fresh approach these products take to the business challenges in these new domains of today’s benefits industry, and how FINEOS AdminSuite positions insurers for business retention and growth in a changing market. They will also highlight the ways in which these new investments actually benefit Claims customers.

## **Health Claims Excellence with FINEOS**

Rob Say, Product Manager, Medical & Health, FINEOS  
2:00 – 2:45 PM  
Oriental Ballroom

The world of Health Claims has particular challenges and opportunities due to its higher-volume and more ecosystem-based nature (providers, invoices and medical coding, etc.). In this session, FINEOS experts will explain how the existing and planned capabilities of FINEOS Claims can help both government schemes (accident compensation, workers compensation) and commercial health insurers excel in this demanding environment.

## **Update on Seven Families Initiative and Summit Conclusion**

Peter LeBeau, Chairman, FINEOS Board of Directors; Michael Kelly, CEO, FINEOS  
2:45 – 3:15 PM  
Oriental Ballroom



Hear an update on the [Seven Families Initiative](#), which was launched in November 2014. This industry initiative aims to raise public awareness of the financial impact of long term illness or disability and show the importance and relevance of income protection in the UK.

## **Closing Cocktail Reception**

3:15 – 4:15 PM  
Room TBD

Summit attendees are invited for light appetizers and cocktails to close out the 9<sup>th</sup> annual FINEOS Global Summit.

**Visit our demonstration booths throughout the FINEOS Global Summit.  
Booths will be open and available at all networking breaks and  
during the sessions on Wednesday afternoon.**

**Demo Booths will be set up for attendees to get one-on-one demonstrations of the latest  
in FINEOS Technology. They will run in the Oriental Ballroom Foyer during all breaks  
between sessions. Booths will include:**

- FINEOS Claims – Line of Coverage Expansion
- FINEOS Billing & FINEOS Policy
- FINEOS Claims for Medical & Health
- Omni-Channel Customer Service
- Person Centric Rehab Planning
- FINEOS Feature Tours

**Thank you to our sponsor!**



**pwc**