



# Global Summit 2016

October 17 – 19

JW Marriott Union Square, San Francisco, CA

SERVING TODAY'S DIGITAL CUSTOMER

## FINEOS Global Summit 2016

### Agenda

#### *Monday, October 17*

##### **North American Customer Advisory Group Meeting**

2:00 – 4:30 PM

Skyline B (21<sup>st</sup> Floor)

The North American customer advisory group (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.

##### **Asia Pacific Customer Advisory Group Meeting**

2:00 – 4:30 PM

Salon II

The Asia Pacific customer advisory group (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

Skyline A & Terrace (21<sup>st</sup> Floor)

Let us welcome you to the 10th annual FINEOS Global Summit during an opening welcome reception, overlooking gorgeous San Francisco. Here you can register and receive your welcome packet, then join us for food, refreshments, and networking with FINEOS staff and summit attendees.

**Tuesday, October 18**

**Breakfast**

7:30 – 8:30 AM

Gallery

**Keynote Address**

**The Future of Healthcare**

*Dr. James Canton, CEO & Chairman, Institute for Global Futures*

8:30 – 9:30 AM

Metropolitan Ballroom

A series of radical trends and disruptions are reshaping healthcare. This profound transformation will change business models, standards of care, the management of disease, and redefine the health care model. What will happen next will affect the future of business, science, the workforce, and society. The transition from healthcare as disease care to prevention will transform human beings. Few organizations are prepared for the trends that are coming and what will be required to effectively navigate this future.



**Dr. James Canton** is a leading global futurist, social scientist, keynote presenter, author, and visionary business advisor. For over 30 years, he has been insightfully predicting the key trends that have shaped our world. He is a leading authority on future trends with an emphasis on harnessing innovation. Dr. Canton has advised three White House Administrations and global business leaders.

**FINEOS Progress & Strategy Update with Innovation & Excellence Awards**

*Michael Kelly, CEO, FINEOS*

9:30 – 10:15 AM

Metropolitan Ballroom



Hear about the current FINEOS strategy, results of our annual customer survey, and our vision for the future. Winners of our annual Innovation & Excellence Awards will also be announced in this session.

**Networking Break**

10:15 – 10:45 AM

Metropolitan Ballroom Pre-Function

**FINEOS Customer Success Story 1**

*Customer to be announced at summit*

10:45 – 11:15 AM

Metropolitan Ballroom



Winners of the 2016 FINEOS Innovation & Excellence award, to be announced at the summit, will present their winning case study and best practices.

**Tuesday, October 18 (cont'd.)**

### **FINEOS Product Strategy**

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

11:15 – 12:15 PM

Metropolitan Ballroom

FINEOS' continued focus is on improving the performance of its customers' core administration and customer service operations, both through addition of new products as well as enriching existing products. In this session, Jonathan and Eoin will explain the thinking behind product strategy, both in terms of technology and business capabilities.

### **Lunch**

12:15 – 1:15 PM

Gallery

### **FINEOS Customer Success Story 2**

*Customer to be announced at summit*

1:15 – 1:45 PM

Metropolitan Ballroom



Winners of the 2016 FINEOS Innovation & Excellence award, to be announced at the summit, will present their winning case study and best practices.

### **FINEOS Claims & the Digital Platform**

*Barry Duffy, Product Manager, FINEOS*

*Adam Dunne, Product Manager, FINEOS*

1:45 – 2:45 PM

Metropolitan Ballroom

Product Managers, Barry Duffy and Adam Dunne, will share highlights from the FINEOS Claims product from both the past year and also from the coming year, including how we reduce complexity in our customers' claims operations through improved usability, more automation and greater standardization. They will also highlight areas of product expansion including payment corrections, partner product integrations, new Lines of Coverage and provider management.

### **Networking Break**

2:45 – 3:15 PM

Metropolitan Ballroom Pre-Function

### **Executive Panel Discussion: Serving Today's Customer**

*Moderated by Chuck Johnston, CMO, FINEOS*

3:15 – 4:15 PM

Metropolitan Ballroom

Insurance executives from across the globe will engage in a moderated discussion of the top challenges they are seeing in the industry today for serving customers, experience they have had within their organization in seeking innovative solutions, and where they see the most opportunity for improvement in customer service going forward.

**Tuesday, October 18 (cont'd.)**

**San Francisco Bay Sunset Dinner Cruise and Casino Night**

5:15 – 9:30 PM

Buses depart from 1<sup>st</sup> Floor Entry Court

Tuesday night's special event will be a private sunset cruise of the San Francisco Bay aboard a luxury yacht. The evening will feature stunning views of the San Francisco skyline, dinner, drinks, and entertainment, including casino games and prizes. Please meet at 1<sup>st</sup> Floor Entry Court at 5:15pm. Buses will be leaving promptly at 5:30 and will not be able to wait.



**Wednesday, October 19**

**Breakfast**

7:30 – 8:30 AM

Gallery

**Keynote Address**

**How APIs Help You Reach the Digital Customer**

*Dr. Mohan Subramaniam*

8:30 – 9:30 AM

Metropolitan Ballroom

APIs have emerged as a dominant force in the digital economy. By enabling unprecedented collaboration among firms for value co-creation, they are transforming how insurers develop and bring new products and services to market. This talk will highlight how APIs are now forging the underpinnings of a firm's ecosystem strategy.



**Dr. Mohan Subramaniam** is Associate Professor of Strategy, Carroll School of Management at Boston College, where he teaches courses in strategy, global strategy, and innovation management. He has a doctorate in Management Policy from Boston University and an MBA from the Indian Institute of Management at Bangalore. He specializes in the areas of ecosystem strategy, global strategy, and the strategic management of knowledge and innovation. His research appears in several leading management journals. Dr. Subramaniam has consulted with senior executives at leading global companies including General Motors, Hamilton Sunstrand, Nextel, New Balance, Voestalpine, and Tata Consulting Services, and has taught executive development programs at the University of Connecticut and Boston College.

**FINEOS Customer Success Story 3**

*Customer to be announced at summit*

9:30 – 10:00 AM

Metropolitan Ballroom



Winners of the 2016 FINEOS Innovation & Excellence award, to be announced at the summit, will present their winning case study and best practices.

**Networking Break**

10:00 – 10:30 PM

Metropolitan Ballroom Pre-Function

## Wednesday, October 19 (cont'd.)

### **New Releases Workshop**

*Maria Moore, Product Consulting Manager*

10:30 – 11:15 AM

Metropolitan Ballroom

Each year, the FINEOS software suite expands significantly, adding new products and, importantly, enhancing the existing solutions to meet our customers' needs. This session takes a look at some of the recently added features and illustrates the business benefits they bring. Although we are on the main stage, this session is designed to be delivered in a workshop format, so questions and comments are welcome throughout.

### **FINEOS Customer Success Story 4**

*Customer to be announced at summit*

11:15 – 11:45 AM

Metropolitan Ballroom



Winners of the 2016 FINEOS Innovation & Excellence award, to be announced at the summit, will present their winning case study and best practices.

### **Lunch**

11:45 – 1:00 PM

Gallery

### **Concurrent Afternoon Sessions**

#### **FINEOS Claims for Medical & Health**

*Rob Say, Product Manager, Medical & Health, FINEOS*

1:15 – 2:00 PM

Skyline A

Discover how FINEOS is addressing challenges for insurers servicing ever more complex medical claims and operating in a rapidly changing ecosystem of Health provision.

Addressing both high volume data driven decisioning and complex case management, Rob will explore the FINEOS approach to intelligent medical & health claims management. This session will highlight opportunities to exploit medical & health capabilities across different business sectors within a digital framework.

#### **FINEOS Cloud Technology**

*Jonathan Boylan, CTO, FINEOS*

1:15 – 2:00 PM

Skyline BC

In Tuesday's Product Strategy session you will have heard about how FINEOS is leveraging technology to bring you competitive advantage in digital service. In this session, Jonathan will delve deeper into our continued investment in Cloud and Digital technology, how FINEOS Cloud is constructed and how you can adopt these capabilities.

**Wednesday, October 19 (cont'd.)**

## **Concurrent Afternoon Sessions**

### **FINEOS Claims for Absence Management**

*CJ Commass, Product Manager, FINEOS*

*Steven McGonagle, Senior Product Manager, FINEOS*

2:05 – 2:50 PM

Skyline A

Recognizing the need for an integrated absence management solution, FINEOS development is well underway to provide clients with an Absence Management Application that will meet client needs well into the future. The FINEOS Claims for Absence Management solution will address the issues that carriers currently face relating to:

- Ongoing regulatory support changes for federal, state and municipal job protected, and paid leave plans
- Integrated platform that will service disability, absence, Rehab RTW plans, and ADA/accommodations under one claim
- Customer Insight relating to transactional, operational and analytical reviews
- Costs associated to maintain outdated legacy or vendor solutions

We are excited to share our research and analysis, our solution to the absence management dilemma, a demo of application progress, and a look at our absence management roadmap.

### **FINEOS Policy & Billing Roadmap Update**

*James Hehir, Product Manager, FINEOS*

*Michael Learned, Senior Product Manager, FINEOS*

2:05 – 2:50 PM

Skyline BC

FINEOS has significantly advanced the development of our new FINEOS Billing and FINEOS Policy systems. Both new products share the FINEOS Digital Platform with FINEOS Claims. In this session, the FINEOS product team will give you an update with specific examples on our progress and a view of our roadmap. The team will directly connect how these new solutions will extend our customers' abilities to address the significant challenges the insurance and benefits industry face today.

FINEOS AdminSuite positions insurers for business growth and customer retention in a changing market. Come meet the team and become part of the conversation.

### **Unlocking the Value of Your FINEOS Investment: The Playbook to Rolling out New Lines of Business**

*Korie Jackson, Consulting Practice Lead, FINEOS*

2:55 – 3:40 PM

Skyline A

Are you in situation where your company is looking to expand its product offering and services to the market? This session will go into detail around leveraging your existing FINEOS platform to help meet the needs of your growing company. We will provide a repeatable process, tips and tricks, and guidelines that can ensure success when rolling out a new line of business on FINEOS.

**Wednesday, October 19 (cont'd.)**

**FINEOS Policy & Billing Software Showcase**

*Alison Carter, Product Manager, FINEOS*  
*Michelle Dowling, Product Owner, FINEOS*  
2:55 – 3:40 PM  
Skyline BC

FINEOS Billing and Policy products are currently in agile development for release in 2017. New capabilities are added incrementally every 10 weeks as laid out in the product roadmap.

During this session you will get an early view of the evolving FINEOS Billing & Policy products. A group administration business scenario will be used to highlight particular capabilities already available in the software and areas currently under development. Demonstrations of this nature are part of agile delivery and we will run this session as an agile demo where feedback is welcome.

**FINEOS Global Summit Closing Session and Cocktail Reception**

*Michael Kelly, CEO, FINEOS*  
3:45 – 4:45 PM  
Metropolitan Ballroom & Pre-Function

Join us for some closing remarks on the 10<sup>th</sup> annual FINEOS Global Summit, immediately followed by a one-hour cocktail reception in the Gallery.

Throughout the conference, demo booths will be set up in the Gallery where attendees can get hands-on access to:

- FINEOS Digital Platform
- FINEOS Claims for Medical & Health
- FINEOS Claims
- FINEOS Claims for Absence Management
- FINEOS Billing & Policy

**Thank you to our sponsors!**

**Gold Level:**



**pwc**

**Silver Level:**

**SMART**  
COMMUNICATIONS



For the most up to date summit information, go to <http://eventmobi.com/FGS2016> from your tablet or smart phone and save a shortcut to your home screen to instantly access your mobile event guide.  
Be sure to create your attendee profile!