

FINEOS Global Summit 2015 Agenda

Monday, November 2

Regional Customer Advisory Group Meetings

2:00 – 4:30 PM

Meeting rooms TBA



Regional customer advisory groups (CAGs) will meet to discuss current projects and bring questions and feedback to FINEOS management. The meetings are by invitation only. If you are interested in joining your regional CAG, please email info@FINEOS.com and we will point you in the right direction.

Opening Welcome Reception

6:00 – 7:30 PM

Capitol Room, Mandarin Oriental

Let us welcome you to the 9th 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 and refreshments while networking with FINEOS staff and Summit attendees.

Tuesday, November 3

Summit Keynote:

High-Tech, High-Touch Customer Service

Micah Solomon

8:30 – 9:15 AM

Oriental Ballroom



Based on Micah Solomon's latest bestseller: 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. Winners of our annual Innovation & Excellence Awards 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 Employee Benefits market continues to go through rapid change as insurers stretch existing processes and systems to support new products, new regulations and new customer expectations. This is driving a strong focus on front office process and technology change, which is straining the insurers back office customer service capability. Insurers are at risk of losing their ability to meet the service expectations of the new consumer.

In this session, we will discuss consumer-centric “Roles and Goals” based strategies to help insurers plan a deliberate back office transformation that 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 – 12:00 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

12:00 – 1:00 PM

The Capitol Room

FINEOS Customer Success Story #1

Customer to be announced at Summit

1:15 – 2:00 PM

Oriental Ballroom

Winners of the 2015 FINEOS Innovation & Excellence awards, to be announced at the Summit, will present their winning case studies and best practices.

FINEOS Claims and the Digital Platform

Adam Dunne, Product Manager, FINEOS; Maria Parker, Claims Product Manager, FINEOS
1:45 – 2:45 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 Critical Illness. The FINEOS team will also share the current areas of research that will bear fruit in future releases.

Industry Session to be announced

3:15 – 4:00 PM
Oriental Ballroom
Session topic and speaker to be announced.

FINEOS Customer Success Story #2

Customer to be announced at Summit
4:00 – 4:45 PM
Oriental Ballroom

Winners of the 2015 FINEOS Innovation & Excellence awards, to be announced at the Summit, will present their winning case studies and best practices.

Tuesday Evening Special Event

Buses depart from hotel lobby at 6 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.

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.

FINEOS Customer Success Story #3

Customer to be announced at Summit

9:30 – 10:15 AM

The 2015 FINEOS Innovation & Excellence awards, to be announced at the Summit, will present their winning case studies and best practices.

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; TBD, Friends First

10:45 – 11:45 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.

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, Solution Architect, 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 9th 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 include:

- Viewpoints
- Analytics
- FINEOS Policy
- FINEOS Billing
- FINEOS Claims Line of Business: Critical Illness, Accident, Waiver of Premium

[Register Now](#)