



FINEOS GLOBAL SUMMIT 2018

Transform Core Systems to Deliver
Excellent Digital Customer Experience

October 15 – 17, 2018 JW Marriott Marquis Miami, FL, US

Monday, October 15

| Start Time | End Time | Description | Location |
|------------|----------|---|-----------------------------|
| 2:00 PM | 5:00 PM | Early Registration Open | Metropolitan Foyer |
| 2:00 PM | 4:30 PM | North American Customer Advisory Group (CAG) The North American CAG will meet to discuss current projects and bring questions and feedback to FINEOS management. The meeting is by invitation only. | Metropolitan Ballroom 2 & 3 |
| 6:00 PM | 7:30 PM | Registration & Welcome Reception Let us welcome you to the 12 th annual FINEOS Global Summit during a reception on the JW Marriott Pool Deck. Here you can register and receive your badge and welcome packet, then join us for food and refreshments while networking with FINEOS staff and Summit attendees. | JW Marriott Pool Deck |

Tuesday, October 16

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| 7:30 AM | 8:30 AM | Breakfast | Metropolitan Ballroom 2 & 3 |
| 8:30 AM | 9:40 AM | "Innovation Imperatives" We are delighted to open this year's Summit with a keynote by Christina "CK" Kerley, an innovation keynoter, futurist and professor. CK focuses Fortune 500s on the 10+ tech opportunities of the next 10 years. | Metropolitan Ballroom 1 |
| 9:40 AM | 10:30 AM | FINEOS Strategy & Innovation & Excellence Awards - Michael Kelly, CEO, FINEOS <ul style="list-style-type: none"> • FINEOS progress update - achievements over the past year • The FINEOS growth strategy and plans for 2019 • 2018 FINEOS annual customer survey results Presentation to the winners of the FINEOS Innovation & Excellence Awards. | Metropolitan Ballroom 1 |
| 10:30 AM | 11:00 AM | Break | Metropolitan Foyer |
| 11:00 AM | 11:20 AM | OpenCore Systems: Thriving in the Platform World - Chuck Johnston, CMO, FINEOS <ul style="list-style-type: none"> • Employee Benefits in 2025 • Platforms & The OpenCore System • (R)evolution of Standards in a Platform World | Metropolitan Ballroom 1 |

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| 11:20 AM | 12:00 PM | <p>FINEOS AdminSuite Roadmap - Eoin Kirwan, VP Product Management, FINEOS</p> <ul style="list-style-type: none"> • Product advances, current and coming • FINEOS perspective on evolving market needs • Collaboration and innovation | Metropolitan Ballroom 1 |
| 12:00 PM | 1:00 PM | Lunch | ThreeFortyFive Restaurant |
| 1:00 PM | 1:30 PM | <p>Leveraging FINEOS for Digital Service - Jonathan Boylan, CTO, FINEOS</p> <ul style="list-style-type: none"> • Turnkey digital service platform in FINEOS Cloud • Develop your digital service roadmap • Integrate channels using OpenCore APIs | Metropolitan Ballroom 1 |
| 1:30 PM | 2:00 PM | <p>FINEOS UX: Practice and Patterns - Rob Say, Product Manager, FINEOS</p> <ul style="list-style-type: none"> • Enhancements for efficiency and for better decisions • Patterns in visual and interaction design • Promoting the voice of the user | Metropolitan Ballroom 1 |
| 2:00 PM | 2:30 PM | <p>How the Explosion of Paid Leave Laws is Disrupting Employee Benefits & Absence Management – Marjory Robertson, AVP & Senior Counsel, Sun Life Financial</p> <ul style="list-style-type: none"> • Growth in paid leave legislation at federal, state, and local level • Employers providing generous paid parental and family leave benefits • A look at the disruption in the marketplace for employee benefits | Metropolitan Ballroom 1 |
| 2:30 PM | 3:00 PM | Break | Metropolitan Foyer |
| 3:00 PM | 4:00 PM | <p>Demo Hour</p> <ul style="list-style-type: none"> • Integrated Claims and Absence • Rehabilitation and Outcomes • FINEOS Digital Service • End-to-End Service | Metropolitan |
| 4:00 PM | 4:30 PM | <p>Integrated Disability and Absence Management: What You Need to Know - Megan Holstein SVP, Absence and Claims Product Management Maura Tarrant, Product Manager, FINEOS</p> <ul style="list-style-type: none"> • Legislative and market landscape • Employee absence experience • Using technology to maintain compliance, streamline resources, and create efficiencies | Metropolitan Ballroom 1 |
| 4:30 PM | 5:00 PM | <p>FINEOS Professional Services – Supporting your Digital Business Transformation Experience - Marc Flynn, Head of Professional Services, FINEOS</p> <ul style="list-style-type: none"> • Our Product Centric Approach using the FINEOS Target Operating Model as the Implementation Blueprint • In Project and Post Live Value Oriented Services available to you • How we build confidence through your transformation journey to meet your business goals | Metropolitan Ballroom 1 |

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| 5:45 PM | 10:30 PM | <p>FINEOS Global Summit Dinner Event</p> <p>Join us for a cocktail and hors d'oeuvres cruise of the Miami Bay followed by dinner at the Penthouse at Riverside Wharf. An evening of rooftop dining, live music and spectacular views of the Miami skyline awaits as we network with peers and celebrate successes.</p> <p>5:45 PM sharp!</p> <p><i>Meet in the hotel lobby at 5:45 PM at which time we will be escorted to the boat dock. Please note that there will be no departures available after 6:00 PM.</i></p> | Hotel Lobby |
| Wednesday, October 17 | | | |
| 7:30 AM | 8:30 AM | Breakfast | Metropolitan Ballroom 2 & 3 |
| 8:30 AM | 9:30 AM | <p>AI in Insurance: Realities and Futures - Executive Panel Discussion moderated by Chuck Johnston, CMO, FINEOS. Industry thought leaders will engage in a discussion on how AI is reshaping Life, Accident & Health Insurance. Contributions from IBM Watson, Jonathan Boylan, CTO FINEOS and CK Kerley.</p> <ul style="list-style-type: none"> • What can AI do for you today? • What are the current limitations and future possibilities? • How will AI and readily available data change the insurance business? | Metropolitan Ballroom 1 |
| 9:30 AM | 10:00 AM | <p>Adopting FINEOS Cloud – Jonathan Boylan, CTO, FINEOS</p> <ul style="list-style-type: none"> • How companies are adopting FINEOS Cloud • The FINEOS investment in service, automation and security • Gaining value from your move to cloud | Metropolitan Ballroom 1 |
| 10:00 AM | 10:30 AM | Break | Metropolitan Foyer |
| 10:30 AM | 11:00 AM | <p>Policy Administration and Billing Solutions Update - Dan Watt, AVP Product Management, North America, FINEOS</p> <ul style="list-style-type: none"> • The current market needs • Where our solution fits • A view into the FINEOS Roadmap | Metropolitan Ballroom 1 |
| 11:00 AM | 11:30 AM | <p>FINEOS Customer Success Story - The 2018 FINEOS Innovation & Excellence award winners will present their winning case studies and best practices.</p> | Metropolitan Ballroom 1 |
| 11:30 AM | 12:00 PM | <p>Supplementary/Voluntary Benefits: The Next Level - Alison Carter, Product Manager, FINEOS</p> <ul style="list-style-type: none"> • Market backdrop • Opportunity for insurers • Claims Servicing | Metropolitan Ballroom 1 |
| 12:00 PM | 1:00 PM | Lunch | ThreeFortyFive Restaurant |

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| 1:00 PM | 1:30 PM | <p>Transition to the FINEOS Insurance Cloud - Paul Barry, SVP Account Management & Korie Jackson, Consulting Practice Leader – Technology, FINEOS</p> <ul style="list-style-type: none"> • Cloud Responsibilities: What would FINEOS take on? • Platform & Standard Services FINEOS Insurance Cloud • Project / BAU Services options | Metropolitan Ballroom 1 |
| 1:30 PM | 2:00 PM | <p>Rehabilitation & Outcomes - Caroline Duffy, Product Consulting Lead, APAC, FINEOS</p> <ul style="list-style-type: none"> • What is Rehabilitation and when should you use it? • How does FINEOS AdminSuite support an effective Rehabilitation Plan? • Measuring the Outcomes of the Rehabilitation Plan | Metropolitan Ballroom 1 |
| 2:00 PM | 2:30 PM | <p>Straight Through Processing: How FINEOS is Raising the Bar - James Hehir, Product Manager, FINEOS</p> <ul style="list-style-type: none"> • Solutions for what have traditionally been manual steps in the claims process • Making the employer's life easier • Quick-wins enabled by digital capabilities | Metropolitan Ballroom 1 |
| 2:30 PM | 2:45 PM | Closing Remarks | Metropolitan Ballroom 1 |
| 2:45 PM | 4:00 PM | <p>Closing Cocktail Hour & Meet the Product Managers - Attendees are invited for light appetizers to close out the 12th annual FINEOS Global Summit. Still have a burning question? Why not come along to the informal Q&A sessions with the Product Managers.</p> <ul style="list-style-type: none"> • FINEOS Policy & Billing (Metropolitan 2) • FINEOS Digital Service & Cloud (Metropolitan 3) • FINEOS Absence (Metropolitan 4) • FINEOS Claims: Latest Version (Gallery 3) | Metropolitan Foyer |

We really appreciate your feedback.

Please complete the evaluation forms and leave at the information table or with a FINEOS staff member.

Thank you

