

## Wednesday, October 4<sup>th</sup>

12:00 pm **Registration Open**

2:00 pm **Product User Groups** *(please register to attend the session for the product you use)*

- Insurity Decisions Suite
- Sure MGA
- Sure Commercial
- Sure Premium Audit
- Sure Loss Control
- Insurity Workers' Comp Suite
- Insurity ClaimsXPress
- Insurity Marine Suite
- Insurity Bridge Specialty Suite

5:00 pm **Welcome Reception**

6:30 pm **Welcome Dinners**

## Thursday, October 5<sup>th</sup>

7:30 am **Breakfast**

8:30 am **Quickly Increasing Your DWP and Improving Your Combined Ratios Using Configurable Technology**

**Chris Lafond**, Chief Executive Office, Insurity

8:55 am **Insurity's New World: Be a Part of Our Plug and Play Ecosystem**

**Ivan Latanision**, Chief Product Officer, Insurity

9:40 am **Networking Break**

9:55 am **Unlocking Success in your Insurtech Implementations: Empowering your Underwriting Teams for Seamless Implementations**

Keeping up with evolving customer expectations and industry trends requires embracing innovative technologies. Insurtech solutions offer immense potential to streamline processes, enhance customer experiences and drive operational efficiency. This session aims to explore the critical connection between your underwriting team and insurtech implementations, providing valuable insights and practical strategies to ensure a seamless transition. Join us for an interactive breakout session that delves into the crucial role of your underwriting team in implementing and maximizing the potential of insurtech solutions.

**Jeremy Pamplin**, Director, Product Management, Insurity  
**Erin Selfe**, Vice President – Information Technology, Pennsylvania Lumbermens Mutual Insurance Company  
**Paul Anderson**, Chief Information Officer, Ryan Specialty

9:55 am **Powering Ultra-Fast Seamless Payment Experiences for Policyholders**

When it comes to claims and billing payments, policyholders today expect the same level of speed and convenience that they experience in all other aspects of their lives. To meet this demand, insurers are increasingly moving to offer digital payment options. Not only does this reduce insurers' costs and improve their overall customer experience, but it also moves them further along in their enterprise-wide journeys to digital transformation. In this session, learn how leading insurers are transforming their payment capabilities to delight policyholders with better experiences while driving instant ROI.

**David Giacomini**, VP & GM, Insurance Solutions, Insurity  
**Abigail Carlson**, Internal IT, Victory Insurance Company  
**Brent Ho-Young**, Chief Executive Officer, Dream Payments

9:55 am **How to Harness the Full Potential of a Cloud Migration**

Cloud has emerged as a generational opportunity that can unlock significant benefits for insurers, including faster time to market, lower total cost of ownership, and economies of scale. However, most insurers aren't realizing the full value of being on the cloud. This session will explore how your organization can harness the full potential of your cloud migration and start capitalizing on the unparalleled scalability, security, and reliability it offers, allowing you to quickly respond to market changes, improve overall business agility, and ultimately provide superior value to your policyholders.

**Jonathan Victor**, Chief Information Officer, Insurance Solutions, Insurity  
**Frank Heaps**, Vice President, Product Management, Insurance Solutions, Insurity

9:55 am **What's Next for the London Market**

The London market continues to evolve, driven by advancements in technology. Insurers continue to look for ways to improve their operational efficiency, customer experience and profitability while addressing current challenges like the rising costs of distribution, regulatory challenges, the push for MGAs to reduce overhead, and more. In this session London market experts will share the current emerging trends they're seeing, and why they matter to you and your business.

**Sylvester Mathis**, Chief Insurance Officer, Insurity  
**Chris Quirk**, Vice President & General Manager, MGA Markets, Insurity  
**Paul Templar**, Chief Executive Officer, VIPR  
**Helene Stanway**, Data & Analytics, Innovation, Central services & Operations, Folio Group

9:55 am **Using Automatic Payroll Validation to Improve Policyholder Satisfaction**

For workers' compensation insurers, validating policyholders' payroll data can be a time-consuming and frustrating task, slowing down their premium audit processes. This session will share how your organization can utilize automatic payroll validation by directly connecting your policyholders' payroll services into our premium audit software to eliminate long audit times, reduce fraud, and improve policyholder satisfaction. Hear directly from one insurer on how they utilize Insurity's integrations with over 125 payroll service providers, covering 70% of all USA employees through a secure online policyholder portal

**Andrew Mueller**, AVP, Product Management, Insurity  
**John Coffaro**, Premium Audit Manager, Amerisure Mutual Insurance

#### 9:55 am **Democratize Your Data**

Enjoy a theatrical opening from the Insurity Analytics team and opening remarks for our sessions focused on democratizing your data from Kirstin Marr, Chief Analytics Officer.

**Kirstin Marr**, Chief Analytics Officer, Insurity

#### 10:55 am **Insurtech Solutions Today: Best of Breed vs. Suite**

Insurers today are struggling with the complexity of differentiating their offerings from competitors while also creating and maintaining software systems that meet the needs of the market they serve. With more choices than ever in the marketplace today, insurance companies must decide between using specialized, best-of breed software applications that are focused on a specific function, or through a complete suite approach involving the use of a single software platform that can handle multiple functions across the insurance value chain. This session will help your organization explore the pros and cons of each and which is the best path forward for your org.

**Sylvester Mathis**, Chief Insurance Officer, Insurity  
**Chris Quirk**, Vice President & General Manager, MGA Markets, Insurity  
**Bryan Guilbeault**, Vice President - Enterprise Systems, Ryan Specialty

#### 10:55 am **Automate and Complete Loss Control Surveys Faster than Ever**

Loss control reports are an effective tool for validating underwriting decisions and mitigating risk. They provide a detailed analysis of potential risks and hazards associated with a particular insurance policy, can help underwriters make more informed decisions about whether to approve or deny coverage, and address potential risks that could lead to claims helping to prevent losses and reduce overall risk exposure. Using automation, insurance companies today are reducing their risk from start to finish. In this session we'll share how insurers are more efficiently managing the survey process and empowering their field staff to complete surveys quickly and easily using leading cloud-based technology.

**Andrew Mueller**, AVP, Product Management, Insurity  
**Gayathri Venkataramani**, Product Owner, Insurity  
**Kristina Stokes**, Senior Compliance and Quality Specialist, AF Group

#### 10:55 am **Personal Lines: Emerging Trends and Market Drivers**

As personal lines carriers face a pervasive hard market across all lines of business, most are focused on profitability overgrowth, firming up their underwriting appetite and risk exposure.

Amidst these broader market drivers, personal lines carriers are facing other challenges such as unpredictable severe weather, legislation changes in markets like California and Florida, and demand from consumers for more self-service and digital experiences. Strategies for navigating these changes and challenges to stay profitable in the coming years will be discussed in this session.

**Frank Heaps**, Vice President, Product Management, Insurance Solutions, Insurity

#### 10:55 am **Tackling your Strategic Initiatives through Advanced Planning with Insurity**

A well-executed budget and timely planning of strategic initiatives makes for a more successful business year. By working hand-in-hand with Insurity's Customer Success team, customers can ensure they're utilizing every resource and tool available to meet yearly objectives and maximize ROI. In this session you'll hear directly from Insurity customers on how they've mastered their pre-planning process and learn best practices you can implement to get more value from your software.

**Mauricio Vaglieri**, Vice President, Customer Success, Insurity

**Kassem Sobh**, Associate Vice President, Customer Success, Insurity

**LuAnn Isley**, Executive Vice President, Amwins

**Beth Long**, Chief Operating Officer, Midwest Builders' Casualty Mutual Group

#### 10:55 am **How to Attract and Maintain Talent amidst an Industry-wide Talent Gap**

Insurance companies rely heavily on the skills and expertise of their workforce to remain competitive and profitable in the marketplace. Attracting and maintaining the next generation of talent is critical to their success moving forward. As experienced employees retire, new talent can help bridge the knowledge gap by bringing in new skills, experiences, and perspectives. With new talent will come new expectations, and your company will be forced to rethink how it's expected to operate to retain these employees. In this session we'll cover the importance of building and investing in a new generation of insurance professionals, how to attract new talent, and how becoming a "conscious employer" can help your company retain the right talent.

**John Wilson**, Academic Director, MS – FinTech, University of Connecticut

**Laurissa Berk**, Director, Student and Faculty Services, University of Connecticut

**Tom Benton**, Partner, ResourcePro Consulting

**Kaitlyn Moss**, Vice President, Human Resources Strategic Programs, Insurity

#### 10:55 am **Executive Workshop**

Put theory into practice in this hands-on executive workshop where you'll apply analytics to make data-driven decisions. In this simulation, you and your team will run an insurance company and compete against your executive peers. Try your hand at leveraging predictive and geospatial analytics in this interactive session. You're in control of your underwriters' authority and renewal strategy in a race to grow your business and maximize your profits. To the victor go the spoils ... and the bragging rights!

**Kirstin Marr**, Chief Analytics Officer, Insurity

**Derek Winkler**, Vice President – Analytics Strategy, Insurity

**Greg Penn**, Vice President – Operations, Insurity

11:45 am **Lunch**

12:45 pm **SI Partner Panel**

**Jennifer Saylor**s, Vice President – SI Success, Insurity  
**Rahul Bhatia**, Partner, SIKICH  
**Jayesh Gawade**, Sr. Client Partner, LTIMindtree  
**Charles Sybert**, Practice Lead, RCG Global Services

1:40 pm **Fighting Premium Fraud through Analytics**

One of the largest sources of fraud plaguing the insurance industry today is risk misclassification, especially in workers' comp, which could be costing insurers millions of dollars per year in missing premium. One of the ways insurers are detecting this type of fraud is through AI-based predictive analytics that can identify policies where fraud is likely occurring. In this session we'll share how you can begin using newly emerging analytics solutions to fight fraud and collect more premium.

**Andrew Mueller**, AVP, Product Management, Insurity  
**Derek Winkler**, Vice President, Analytics Strategy, Insurity  
**Dan Trociuk**, AVP, Director of Premium Audit, Utica National Insurance Group

1:40 pm **Succeeding in an Increasingly Segmented Market**

The insurance market is changing and growing in different segments more than ever before. As competition in the industry rises, both existing insurers and new entrants are increasingly driven to specialize and carve out a niche where they can be successful. The carrier market has been evolving and risks that were considered outside-the-box a decade ago are now considered more mainstream. As more carriers begin to write these complex risks, those that already had an advantage in those areas are challenged to further differentiate themselves. In this session you'll learn how to navigate this competitive landscape and set your organization up for continued growth and success in an increasingly segmented market.

**Frank Heaps**, Vice President, Product Management, Insurance Solutions, Insurity  
**Tyler Nielsen**, Chief Operating Officer, Utah Business Insurance Company

1:40 pm **Venturing into the Open Digital Ecosystem with Plug & Play Solutions**

The insurance industry is on the verge of a major shift due to ongoing digitization, the explosive growth of AI, and the enormous amounts of data accelerating the pace of change. Digitization is already embedded at every level of the competitive landscape, and insurers must understand that digital ecosystems and platforms will define the future of insurance. This session will explore the rise of the open digital ecosystem, its impact on the nature of risk, and how insurance organizations can successfully adapt with plug and play solutions.

**David Giacomini**, VP & GM, Insurance Solutions, Insurity  
**Jag Randhana**, VP – Information Technology & E-commerce, CAMICO Mutual Insurance  
**Andrew Coates**, Account Director, Embedded Platform, Workato  
**Nathan Bolton**, Delivery Director, Alchemy

1:40 pm **Marine Insurance: Solving Today's Challenges to Drive Growth and Longevity**

Marine insurers today face a host of challenges, including lagging profitability, increased exposures and losses, regulatory and environmental changes, supply chain disruption, and inflation. Addressing the rapidly changing needs of the cargo industry requires underwriting innovation, increased efficiency, and cost reduction. In this session, we'll take a deep dive into these challenges and explore how marine insurers can use flexible technology to support growth and longevity.

**Gabriel Suissa**, Vice President, Solutions Consulting, Insurity  
**Taher Sobh**, Product Owner, Insurity

1:40 pm **Analytics Track – Trust Your Data**

Data should be accessible for every user from anywhere and always result in the same view, but too often that's not the case. Data is universally both an asset and a problem for every insurance organization. Having lots of data is good but using your own data to make better business decisions with speed, consistency, and accuracy is key. You also need an effective way to test and incorporate third party data to remain competitive. This session will explain how to ensure everyone has access to one centralized and single source of truth. We'll start with the end in mind of achieving seamless actionable insights and detail how data becomes accessible and reliable so you can rapidly collect, transform, and operationalize it.

**Greg Penn**, Vice President - Operations, Insurity  
**Indivar Nayyar**, Vice President – Data & AI, LTIMindtree

2:30 pm **Networking Break**

2:45 pm **Ryan Specialty: Executing on a Winning Technology Strategy in a Rapidly Growing Market**

Smart P&C insurers today are transforming themselves through technology they use. Ryan Specialty, a wholesale broker and managing underwriter, is a leading player in the MGA space. With acquisitions on the rise in this space, many insurers today are searching to find the best approach to consolidate systems and transition to the cloud. Bradley Bodell, Chief Information Officer at Ryan Specialty, will share how Ryan Specialty has developed and is executing on it's strategy of technology transformation in order to provide streamlined solutions to their customers, and how they partner with Insurity to further their mission to provide innovative specialty insurance solutions for insurance brokers, agents and carriers.

**Bradley Bodell**, Chief Information Officer, Ryan Specialty

3:10 pm **Innovation Stories & Awards**

5:30 pm **Transportation to Offsite**

6:00 pm **Offsite Networking Dinner & Reception**

**Friday, October 6th**

7:30 am **Breakfast**

8:30 am **Rating the Future: Decoding Innovation, the Regulatory Environment, and other Industry Trends with AM Best**

AM Best is the leading provider of ratings, news, analysis, and financial information for the finance industry. Insurity's Chief Analytics Officer, Kirstin Marr, is joined by AM Best's Chief Rating Officer, Stefan Holzberger, for a fireside chat discussing updates on Innovation Criteria as part of AM Best's financial strength rating and their new process for assessing MGA's. Stefan will also share his viewpoints on the current regulatory environment around advanced analytics, including machine learning and AI.

**Stefan Holzberger**, Chief Rating Officer, AM Best  
**Kirstin Marr**, Chief Analytics Officer, Insurity

9:05 am **Emerging Trends Shaping the Future of Workers' Compensation**

From the rising medical costs of claims to changing employee/contractor classifications to regulatory and legislative reform, the workers' compensation environment is on track to change dramatically over the next several years. This session will dive deep into the current trends impacting workers' compensation and how you can fortify your organization to handle its impacts in the year ahead.

**Jamie Schwartz**, Enterprise Account Executive, Insurity

9:05 am **Streamlining the Claims Experience**

Embracing technology and streamlining processes can help insurers speed up the claims lifecycle and improve customer satisfaction, reducing the time it takes to process claims and improve accuracy. Innovative claims handling technology can deliver customers a modern experience with direct-to-consumer distribution, claims payments, coverage verification, and intelligent fraud detection. This session will share strategies and technologies insurance companies can implement to improve the claims experience for their customers and make the process more efficient.

**Cindy Casteel**, Director, Product Management, Insurity  
**John Laverty**, Senior Solution Consultant, Insurity

9:05 am **Why the Regulatory Landscape is the Biggest Disruptor Insurers Need to Start Talking About**

As legislation from coast to coast begins to impact go-to-market strategies, insurers need to be prepared for the avalanche of bureau content changes that are coming over the next 18 months. With the emergence of new regulatory changes to increasingly severe weather events, lingering economic uncertainty and beyond, insurers must possess the capacity to support the innovation, underwriting, and pricing of unique and difficult to place risks. In this session, regulatory experts will help answer strategic questions such as how to price business moving forward and how to deal with increased competition as more carriers decide to stay in certain states.

**Sylvester Mathis**, Chief Insurance Officer, Insurity  
**Fatima Dubauskas**, Vice President, Customer Experience, Insurity  
**Joseph Lam**, Director - Commercial Casualty Product Development, Verisk

9:05 am **The Path to New Product Innovation**

Innovation and launching new products is essential for business growth, customer retention, and remaining competitive in the insurance landscape. As new risks emerge and consumer preferences evolve, insurers are challenged to bring new products to market that keep up with consumer demands. Whether your organization is looking to offer new, unique products to differentiate yourself in the market, to increase sales and revenue, or to streamline operations, this session will help your organization uncover the right path to innovation by sharing best practices from insurers at the forefront of innovation.

**Frank Heaps**, Vice President, Product Management, Insurance Solutions, Insurity  
**Derek Winkler**, Vice President, Analytics Strategy, Insurity

9:05 am **Current Trends Driving the MGA Market Forward**

The MGA insurance market is undergoing significant changes driven by technology, specialization, and regulatory developments. MGAs that can adapt to these changes and differentiate themselves from their competitors are likely to thrive in this evolving market. As MGAs increasingly use technology to streamline their operations, improve customer service, and enhance risk analysis, we're seeing a greater focus on specialization in niche markets, strategic partner formation, cloud-based platforms, and a rising demand for customized solutions. This session will take inventory of the current technology trends driving the MGA market forward and provide a roadmap to the future.

**Jason Pamplin**, VP, Product Management, MGA Markets, Insurity  
**Tiffany Poletti**, Chief Operating Officer, Arrowhead Insurance  
**Paul Anderson**, Chief Information Officer, Ryan Specialty

9:05 am **Enrich Your Data**

Insurers are racing to be as granular as possible by enriching their own data and embedding the most recent information as more data is created in real time. During this session, hear insights from industry experts on how they've harnessed the potential of geospatial tools in their roles. Plus, learn how organizations like yours can successfully implement geospatial tools, when to pull in third-party commercial data, important lessons from recent hazards, and more

**Rebecca Morris**, Associate Vice President, Solution Architect, Insurity  
**Monica Mason**, Head of Analytics, SVP, Core Specialty  
**Christine Wallinger**, Director, Customer Success – Data & Analytics, RLI Insurance Company

9:55 am **Exhibitor Networking Break**

10:25 am **Uncovering Missing Premiums through Automation**

Automating the process of uncovering missing premiums can be a great way to save time and boost revenue, eliminating the time-consuming, manual audit process. In this session we'll



share how leading insurance companies are leveraging automation tools to streamline the process of uncovering missing premiums and improve overall revenue management.

**Andrew Mueller**, AVP, Product Management, Insurity  
**Michelle Olson**, Field Audit Manager, Cincinnati Insurance Companies

10:25 am **Embracing New Distribution Channels to Expand your Customer Base and Increase Revenue**

Reaching the right customers in a cost-effective way is crucial to an insurer's success. By smartly managing and embracing new distribution channels, insurers can gain a competitive advantage and reach a wider audience to expand their customer base and increase revenue. However, to succeed, this will require insurers to not only change their digital capabilities, but also their behaviors. To successfully compete in this new landscape, insurers must now look to their competitors, partners and friends as an extension of themselves. In this session we'll share how insurance providers can embrace new distribution channels and build partnerships to better meet their customers' needs.

**Chris Quirk**, Vice President & General Manager, MGA Markets

10:25 am **Building a Modern Underwriting Function through Automation and Analytics**

Underwriters have long been challenged with having to swap between multiple systems, difficulties accessing necessary data, time-consuming tasks, and more. Today, modern underwriting teams are relying on innovative technology that incorporates automation and analytics to empower their underwriters to focus more on complex risk assessment, and less on routine tasks. With the data underwriters need for data-driven decision-making at their fingertips, leading insurers have been able to improve profitability and reduce their loss ratios. In this session you'll learn how technology is enabling these shifts toward more modern, and ultimately more profitable, underwriting functions.

**Jeremy Pamplin**, Director, Product Management, Insurity  
**Harish Kapur**, Chief Executive Officer, Across America Insurance  
**Paul Anderson**, Chief Information Officer, Ryan Specialty

10:25 am **Unleashing the Power of Automation for Next-Level Efficiency in Insurance**

Automation and AI tools are poised to make powerful and dramatic changes to the insurance landscape, especially when it comes to talent retention and employee productivity. However, those insurers who know how to expertly leverage automation and AI to drive efficiency, rather than let it drive their business to the ground, will be the shot callers in the future of insurance. In this session, we'll explore how leading insurers are mastering automation and AI to drive efficiency and set themselves up for the future.

**David Giacomini**, VP & GM, Insurance Solutions, Insurity  
**Mladen Subasic**, Chief Product Officer, OIP Robotics  
**Edward Charlton**, Director, Alchemy

10:25 am **Make Better Decisions**

Speed of insight and making data-driven decisions is only increasing in its importance to insurers, MGAs, and brokers. A blend of technology and cultural mindsets comes together to create an analytics user experience to unlock this potential. This session will cover key topics like integrating & embedding data analytics directly into workflows, creating a data-driven culture, leveraging the power of contributory data, and how to foster early wins that build momentum internally and with external stakeholders.

**Helen Chin-Tow**, Senior Solution Architect, Insurity  
**Dan Trotter**, SVP – Regulatory Compliance, BITCO Insurance Co.

11:25 am **Five Actionable Learnings You Should Take Back to Transform and Accelerate Your Technology**

**Sylvester Mathis**, Chief Insurance Officer

11:50 pm **Boxed Lunches, Depart**

*\*Agenda topics, speakers and times are subject to change.*