

# AGENDA

Employee Benefits Practice Group Meeting –

“Growing and Operating Your Business: Critical Areas for 2019 and Beyond”



Tuesday, February 19, 2019			
Time	Title	Description of Session	Location
12 p.m.	<b>Joint John Northrup Memorial Golf Outing – Optional</b>  If registered, please meet in the Clubhouse at 11:30 a.m.  Sponsored by Fred C. Church, Applied Systems & Unum		National Course
6:30 p.m.	<b>Group Reception</b>  Sponsored by GeoBlue		Ballroom Commons
7:30 p.m.	<b>Group Dinner</b>  Sponsored by Colonial Life		Ballroom Commons

Wednesday, February 20, 2019 – Grow, Expand, Increase (Your Business)!			
Time	Title	Description of Session	Location
7 a.m.	<b>Breakfast</b>		ChampionsGate
7:30 a.m. <i>Optional</i>	<b>Overview of Assurex Global EB Resources</b>  Christine Leggett Assurex Global  <b>PARTNER ONLY SESSION</b>	Please join us for an overview of the many Employee Benefit resources available to you and your EB teams exclusively through Assurex Global. Think you already know everything Assurex Global offers? We’re constantly expanding and enhancing our resources, so even seasoned veterans are encouraged to attend to learn a thing or two!	International Ballroom I
8 a.m.	<b>Welcome &amp; Program Overview</b>  Beth Essey Henderson Brothers	We all have responsibilities to grow the business and to operate it efficiently – these are the themes for this year’s meeting.	International Ballroom I

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Wednesday, February 20, 2019 – Grow, Expand, Increase (Your Business)!			
Time	Title	Description of Session	Location
		Today’s theme is: Come ready to <u>grow</u> your business!	
8:10 a.m.	<p><b>Assurex Global Corporate Update</b></p> <p>Jim Hackbarth President &amp; CEO Assurex Global</p> <p>Tim Wiechers Executive Vice President/COO Assurex Global</p> <p>Andy Sloan President &amp; CEO The Magnes Group Inc.</p>	General overview and update on 2018 successes and 2019 initiatives, including an update on the strategic planning process	International Ballroom I
8:30 a.m.	<p><b>Panel: Market Trends and how various channels are addressing</b></p> <p>Katie Parks National Vice President, Broker &amp; Consultant Relations UnitedHealthcare</p> <p>Eric Reisenwitz SVP, Group Protection Distribution &amp; Integration Lincoln Financial Group</p> <p>Jamie Hawkins President &amp; CEO Benefit Technology Resources</p> <p>Bob Radecki Principal Benefit Comply</p>	Hear from 4 subject-matter-experts from 4 different channels of Employee Benefits. In a “TED-talk” style session, each will provide his or her view of the current market, what to expect in 2019 and how they intend to tackle the challenges that our market continues to face.	International Ballroom I
9:50 a.m.	<p><b>Break</b></p> <p>Sponsored by VSP</p>		

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Wednesday, February 20, 2019 – Grow, Expand, Increase (Your Business)!			
Time	Title	Description of Session	Location
10 am.	<b>Optimizing Benefit Practice Growth</b>  Jenn Walsh Founder GenuineShift	20%BY2020 is a growth planning framework developed by Jenn Walsh, founder of GenuineShift. She helps Benefit Executives get "unstuck" and collaborates with teams to make impactful, yet manageable, changes that accelerate profitable growth. Jenn will be sharing observations on the market and tangible ideas for how to jump start change within your organization.	International Ballroom I
11 a.m.	<b>Agency Big Bets – A Partner Conversation</b>  Beth Essey Henderson Brothers  Jenette Schafer The IMA Financial Group  Troy Kane PayneWest Insurance  <b>PARTNER ONLY SESSION</b>	Is your firm making any “big bets” for growth in 2019? Hear from 3 Partners who are investing heavily in unique initiatives that they hope will produce a significant ROI this year and into the future!	International Ballroom I
12 p.m.	<b>Lunch</b>  Sponsored by Ameritas		Golf Course Commons
1 p.m.	<b>“Pitch-a-Palooza”</b>  Chris Campbell Cragin & Pike  Sean Ganoë Henderson Brothers  Ben Halbach Catto & Catto  Mark Sucoloski	Hear various sales pitches from other Partners. Learn how some of your peers are even incorporating the Assurex Global story to win new business. Benefit from hearing others’ ideas to help refine or reaffirm your own pitch/value proposition.	International Ballroom I

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Time	Title	Description of Session	Location
	RCM&D  <b>PARTNER ONLY SESSION</b>		
2:15 p.m.	<b>Group Discussion: Successful Sales Campaigns</b>  <b>Facilitator:</b> Ken Olson The Horton Group	Hear from a Partner on how they moved their sales approach to more specific sales campaigns, closed \$4.2M of new business in 2018 and plan to replicate that success in 2019. You'll also hear from Unum on how a playbook was developed to assist firms with a particular product campaign.	International Ballroom I
3 p.m.	<b>Break</b>  Sponsored by Health Advocate		
3:15 p.m.	<b>Partner Panel: Winning in the 50-250 Employee Market</b>  Ryan Fridborg Bolton & Company  Bill Fisher Oswald Companies  Barry Burks Ross & Yerger	While some Partners prospect in the large market segment, all firms are active in pursuing employers in the 50-250 employee sector. This session will spotlight 3 Partners that have had excellent success in writing substantial business in this market and share how they're successful.	International Ballroom I
4 p.m.	<b>A Rewarding Future!</b>  Scott Cawood, Ed.D., CCP, GRP President and CEO WorldatWork	Today, every organization is being challenged to rethink its strategy, including how it competes for and engages with workers in an ever-changing, on-demand world. Given the criticality of engaging the right talent, it's time to find new ways to create fun and rewarding workplaces. Now is the time for benefits professionals to step in and help employers reshape the workplace experience to engage and align people in more	International Ballroom I

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Time	Title	Description of Session	Location
		meaningful ways. Join WorldatWork President & CEO, Scott Cawood, as he discusses the unique role today’s professionals play in helping organizations make the connection between highly effective organizations and deeply meaningful rewards that ultimately place organizations ahead of their competitors.	
5 p.m.	<b>Adjourn</b>		
6:30 p.m.	<b>Group Reception &amp; Dinner</b> Reception sponsored by UnitedHealthcare  Dinner sponsored by Lincoln Financial Group  Please meet in the hotel lobby at 6:30 p.m. for a short bus ride to the venue.		<a href="#">Planet Hollywood</a>

Thursday, February 21, 2019 – Operate, Run, Manage (Your Business)!			
Time	Title	Description of Session	Location
7:30 a.m.	<b>Breakfast</b>  Sponsored by Medcom		ChampionsGate
8 a.m. <i>Optional</i>	<b>Making Small Groups Profitable</b>  Jessica Caudle Director, Employee Benefits Patra Corporation  Dave Tight SVP Business Development Patra Corporation  Tom Polenzani	In this session, we’ll look into the future of small group and discuss the challenges brokers experience when trying to be profitable in this market.  We’ll discuss the various paths that brokers have taken to address the nuances of small group and dive into the solution that one AG	International Ballroom I

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Thursday, February 21, 2019 – Operate, Run, Manage (Your Business)!			
Time	Title	Description of Session	Location
	Bolton & Company	partner, Bolton, has embraced to improve their profitability.	
8:30 a.m.	<b>Day One Recap &amp; Day Two Overview</b>  Beth Essey Henderson Brothers	Today’s theme is: Come ready to work <u>on</u> the business	International Ballroom I
8:45 a.m.	<b>Partner Panel: Managing the 250-1,000 Employee Market</b>  Moderator: Dan Gowen Assurex Global  Panelists: John Kirke The IMA Financial Group  Kathy Prosser Woodruff Sawyer  Andy Vctor MJ Insurance	This Partner led panel will highlight how some are managing their larger clients, touching on service, compensation and staffing. The areas explored will be identical to those explored in the table discussions to follow.	International Ballroom I
9:45 a.m.	<b>Break</b>  Sponsored by Innovu		
10 a.m.	<b>Table Discussions: Managing the 50-250 Employee Market</b>  <b>PARTNER ONLY SESSION</b>	Discussion questions will be distributed in a pre-conference communication – please come prepared to share with your peers	International Ballroom I
11:15 a.m.	<b>Key Takeaways and Benchmarking</b>  Ken Olson The Horton Group  Kathy Prosser Woodruff Sawyer	We will recap the table discussions by capturing key highlights from each of the tables. Results will be summarized and provided back to attendees after the conference concludes.	International Ballroom I

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Thursday, February 21, 2019 – Operate, Run, Manage (Your Business)!			
Time	Title	Description of Session	Location
11:30 a.m.	<b>Wrap-Up</b> Beth Essey Henderson Brothers		International Ballroom I
11:45 a.m.	<b>Adjourn</b>		

Thank you to *ThinkHR* for sponsoring the meeting Wi-Fi!