

**UNDERNEATH**  
 "you can find everything that your interesting just one-touch / one-click is enough"  
**Do!**  
 ✓ privacy setting  
 ✓ Showcase your skills.  
 ✓ be careful your work and your media

**Don't**  
 x share or post something that give the problems to other people.  
 x spend too much time on social media.

**PROGRAM**

**INNOVATION**

**SOCIAL BUSINESS**

**WHAT SHOULD WE DO**

**POWERFUL**  
**A LOT of FRIENDS**  
 connect + follow  
 "all in one"

**engage your community regularly**  
 → follow online's friend  
 → share some moment  
 → find new inspiration  
 focus on activities that you interesting

**\* be careful every word you post because social media is powerful and many people used social media.**

**what's POST mean** → share your opinion on your personal space to your follower.

**Online communication**  
 | post | share | comment | follow |  
 → subscribe

**how to find the best**

**learning**  
 → by ← watching

**if I want to find new inspiration, new community and new things for my company** → what should I do

**social media is the best choice for your company, your business and your life, cause it's had many knowledge for learning.**

**\* all in one social media is the best choice !!**

**Cloud computing**  
 @ databases  
 @ technology  
 @ online storage  
 @ servers

**big data**

**Contact**  
 Follow



# THE 2016 SOCIAL BUSINESS CONFERENCE FOR FINANCIAL SERVICES

AUGUST 17 – 19, 2016 • SEAPORT BOSTON HOTEL AND WORLD TRADE CENTER • BOSTON, MA

**Social: Changing The Way We Do Business**



# Social Business for Financial Services Conference

## Wednesday, August 17

**WORKSHOP 1** — 1:00 to 3:30 p.m.

*Inside Innovation*

*Waterfront III*

**MIKE LLOYD**, CEO, YourPoncho; **ANDREW KREBS-SMITH**, CEO, Social Fulcrum; **ALLEN EGBERT**, CEO, - AskKodiak; *Moderator:* **RJ IRVING**, CEO, Melius

**WORKSHOP 2** — 4:00 to 5:00 p.m.

*Live From the Mainstage: Hearsay on the Air Podcast*

*Waterfront II*

**VICTOR GAXIOLA**, Senior Customer Advocacy Manager, Hearsay Social

**WORKSHOP 3** — 5:15 to 6:00 p.m.

*App-tastic*

*Waterfront II*

**CAROLYN CLEMENT**, Business Relationship Coordinator, Compliance, LIMRA; **NORAH DENLEY**, Assistant Research Director, Distribution and Technology Research, LIMRA

**RECEPTION WITH EXHIBITORS** — 6:00 to 7:00 p.m.

*Harborview Ballroom*

## Thursday, August 18

**INSTAGRAM WALK & RUNNERS MEET-UP** — 6:00 to 6:40 a.m.

*Meet at Conference Registration Desk*

**BREAKFAST WITH EXHIBITORS** — 7:30 to 8:15 a.m.

*Harborview Ballroom*

**GENERAL SESSION** — 8:15 to 9:30 a.m.

*Amphitheatre*

*Everything Has Changed, Nothing Is Different*

**SCOTT STRATTEN**

*Disruptive and UN-Traditional Sales Marketing & Branding Expert*

**NETWORKING BREAK WITH EXHIBITORS** — 9:30 to 9:45 a.m.

*Harborview Ballroom*

**CONCURRENT WORKSHOPS** — 9:45 to 10:45 a.m.

*Waterfront II*

**1.1 Social and Digital Data Analytics**

**ROB KNOP**, CEO, Assist You Today

*Waterfront III*

**1.2 Mobile and Social: The Digital Edge**

**GREGORY BAILEY**, Co-Founder & CEO, Denim

*Amphitheatre*

**1.3 IRL: Hearing From Social Advisors**

**CHRISTOPHER PARADISO**, Owner, Paradiso Insurance; **HANNAH SORENSEN**, Financial Associate, Thrivent Financial; **DAVID J. WILSON**, MBA, Financial Advisor, New York Life Insurance Company; *Moderator:* **PHYLLIS TOZZI**, MBA, Corporate Vice President, Agency Marketing, New York Life Insurance Company

**NETWORKING BREAK WITH EXHIBITORS** — 10:45 to 11:00 a.m.

*Harborview Ballroom*

**CONCURRENT WORKSHOPS** — 11:00 a.m. to 12:00 noon

*Waterfront III*

**2.1 Employee Advocacy: The Power of Your Crowd**

**AMY MCILWAIN**, Global Industry Principal, Financial Services, Hootsuite

*Waterfront II*

**2.2 Social Media ROI and Measuring the Social Potential**

**TERRY GOLESWORTHY**, President, Customer Respect Group

*Amphitheatre*

**2.3 "Liking" Life Insurance on Facebook**

**MICHELE MITCHELL**, VP, General Manager, Life Stages

**LUNCH WITH EXHIBITORS** — 12:00 noon to 1:00 p.m.

*Harborview Ballroom*

**CONCURRENT WORKSHOPS** — 1:00 to 2:00 p.m.

*Amphitheatre*

**3.1 Content Happens**

**CHRIS HILL**, Vice President of Creative Digital, Life Happens; **MAGGIE LEYES**, Vice President of Content Strategy, Life Happens

*Waterfront III*

**3.2 Customer Service**

**SCOTT CAMPBELL**, Executive Vice President and Chief Marketing Officer, American National

# Social: Changing The Way We Do Business

Waterfront II

## 3.3 Disruptive Insurance Business Models: What Can We Learn from Startups Who Want to Eat Our Lunch?

**FARRON BLANC**, VP, Innovation Studio Lead, RGAx; **JAY FARBER**, Associate, F-Prime Capital Partners; **RJ IRVING**, CEO, Melius;  
Moderator: **CORINA ROY**, Assistant Vice President, Digital Experience, MassMutual

## NETWORKING BREAK WITH EXHIBITORS — 2:00 to 2:30 p.m.

Harborview Ballroom

## GENERAL SESSION — 2:30 to 3:15 p.m.

Amphitheatre

### Google This: Micro-Moments and The Customer Experience Journey

**STEPHEN ARTHUR**

Director, US Financial Services  
Google

## 4th ANNUAL SILVER BOWL AWARDS PRESENTATION — 3:15 to 4:00 p.m.

Amphitheatre

## NETWORKING BREAK WITH EXHIBITORS — 4:00 to 4:15 p.m.

Harborview Ballroom

## CONCURRENT #SILVERBOWLAWARDSSESSIONS — 4:15 to 5:15 p.m.

Amphitheatre

### 4.1 Best Use of Social for Consumer Education

Waterfront III

### 4.2 Best Use of Social for Customer Service

Waterfront 1A

### 4.3 Best Use of Social for Recruiting

Waterfront 1B

### 4.4 Best Integrated Social Campaign

Waterfront 1C

### 4.5a Best Use of Social for Social Good (first half hour)

Waterfront 1C

### 4.5b Best Use of Emerging Social Channels (second half hour)

Waterfront II

### 4.6 Best Use of Social by Agent/Advisor

## SILVER BOWL AWARDS RECEPTION — 5:15 to 6:30 p.m.

Harborview Ballroom

## Friday, August 19

## BREAKFAST WITH EXHIBITORS — 7:30 to 8:00 a.m.

Harborview Ballroom

## GENERAL SESSION — 8:00 to 8:45 a.m.

Amphitheatre

### The Omnichannel Client and Advisor

**CLARA SHIH**

Chief Executive Officer and Founder  
Hearsay Social

## NETWORKING BREAK WITH EXHIBITORS — 8:45 to 9:15 a.m.

Harborview Ballroom

## GENERAL SESSION — 9:15 to 10:00 a.m.

### EXHIBITOR DRAWING TO BE HELD FOLLOWING THE GENERAL SESSION

Amphitheatre

### The Power of Thought Leadership: Building Your Brand in a Crowded Social Space

**DEBRA JASPER, Ph.D.**

Founder and Chief Executive Officer  
Mindset Digital

**BETSY HUBBARD**

Founder and President  
Mindset Digital

## REFRESHMENT BREAK — 10:00 to 10:15 a.m.

Harborview Ballroom

## GENERAL SESSION — 10:15 a.m. to 11:00 a.m.

Amphitheatre

### Embracing the Financial Shift

**DEEPANJAN DE**

Industry Leader, Financial Services  
Facebook

## GENERAL SESSION — 11:00 a.m. to 12:00 noon

Amphitheatre

### Disruptive Innovation

**ERIK QUALMAN**

Technology and Social Media Expert  
Author of Socialnomics

## ADJOURNMENT — 12:00 noon

# Antitrust Policy and Caution

Each person attending this function must be mindful of the constraints imposed by federal and state antitrust laws. The people here today represent companies that are in direct business competition with one another. LIMRA/LOMA's purpose is to provide a forum for the free exchange of ideas on the designated topics of our meetings. It is not the purpose of these meetings to reach any agreement that could have anticompetitive effects.

Individuals must keep in mind that a violation of the antitrust laws may subject them to substantial fines and a jail term. You can avoid problems by following simple guidelines:

- Stick to the published agenda.
- Pricing, premiums, benefits to be offered or terminated are competitively sensitive information which competitors should not exchange or discuss with each other. Never take a poll of views or make a collective agreement on these issues.
- Always retain your right to make an independent judgment on behalf of your company.

LIMRA/LOMA is dedicated to the purpose of assisting all of its members to achieve their competitive potential.

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