Illuminating Data

2016 BIG DATA ANALYTICS CONFERENCE

JUNE 20 – 22, 2016 • REVERE HOTEL/BOSTON COMMON • BOSTON, MA

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covering the business
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2016 BIG DATA ANALYTICS CONFERENCE

Illuminating Data

Welcome to LIMRA's Big Data Analytics Conference! As companies strive to compete in an ever-changing marketplace, the role of information — and more importantly, insight — becomes more critical. As the demand for insight from information grows, how are companies applying these tools successfully, and how are they making the case to expand use throughout their organizations?

Advanced analytics can transform how you do business, but realizing its potential requires complex, large-scale organizational changes. LIMRA research reveals 9 in 10 financial services companies use big data analytics for a competitive advantage. Almost half of these companies have fully implemented big data initiatives.

This conference focuses on helping attendees bridge the gap between big data and better decisions. At this conference, you'll learn about putting big data to work and delivering strategic value through developing new business solutions using analytics. We are pleased that you have joined us to gather insight, value, and ROI for your organization.

GENERAL SESSION HIGHLIGHTS

Big Social Data

JENNIFER GOLBECK
Director of the Human-Computer Interaction Lab
University of Maryland, College Park

Increasingly companies are seeking to leverage their social media strategy to maximize customer engagement. However, there is a desire to balance the need for the insight and the desire to respect customer privacy. Dr. Jennifer Golbeck, a world leader in social media research, tracks the rise of social networks and data analytics, how new computational techniques are revealing hidden traits of millions of people online, and how this impacts the future of business. Part creepy and part surprise, this opening keynote address looks at how scientists and companies are leveraging big social data to develop new insights into customers and what they want.

Spotlight on Analytics — A Conversation

LOUIS DIMODUGNO
Chief Data and Analytics Officer
AXA Equitable Life Insurance Company

VICTOR S.Y. LO
Vice President, Data Science,
Workplace Investing
Fidelity Investments

ERIC SONDERGELD, ASA, CFA, *Moderator*
Corporate Vice President,
Strategic & Technology Research
LIMRA

Join us as we hear from a group of analytics leaders discuss some of today's most critical aspects of advanced analytics. Topics discussed will include the emergence of cognitive computing, the role of analytics in strategic and tactical decision making, the challenges of advancing analytics initiatives, and the threat of legislation to the fair use of data. In addition, when registering for the conference, attendees will be able to suggest questions for our industry experts.

The Future of Financial Decision Making Using Cognitive Computing

SRIDHAR IYENGAR
IBM Distinguished Engineer,
Cognitive Computing Research
IBM TJ Watson Research Center

Take a journey with IBM to see how advances in cognitive computing can help:

- An investment banking expert narrow mergers and acquisition targets by using cognitive assistants to leverage techniques like 'Bayesian Smart Swaps'

- A financial sentiment aggregator derive investment sentiment and outlook by using a cognitive engine to consume investment reports

- A compliance officer extract requirements and obligations from industry regulatory documents and map them to controls through a cognitive text analytics engine

- A financial services company better tailor products and services to individual customers through analysis of psycholinguistic features from written text and images

We will close with a demonstration of how Watson technology can provide timely and relevant guidance and recommendations to a financial advisor by combining traditional portfolio data with a stream of social, news, investment reports and other unstructured data.

Program Overview

Monday, June 20

SEMINAR REGISTRATION — *8:00 a.m. to 5:00 p.m.*

SEMINAR ATTENDEES LUNCH — *12:00 noon to 1:00 p.m.*

APPLIED ANALYTICS EXPERIENCE SEMINAR — *8:00 to 4:30 p.m.*

OPENING RECEPTION — *5:00 to 6:30 p.m.*

Tuesday, June 21

REGISTRATION — *7:30 a.m. to 5:00 p.m.*

BREAKFAST — *7:15 to 8:15 a.m.*
Sponsored by IBM

GENERAL SESSIONS — *8:15 to 10:00 a.m.*

Big Social Data
JENNIFER GOLBECK
Director of the Human-Computer Interaction Lab
University of Maryland, College Park

Spotlight on Analytics — A Conversation
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LIMRA

REFRESHMENT BREAK — *10:00 to 10:30 a.m.*

CONCURRENT SESSIONS — *10:30 to 11:30 a.m.*

LUNCHEON — *11:30 a.m. to 1:00 p.m.*
Sponsored by Qlik

CONCURRENT SESSIONS & MICROSUMMIT — *1:00 to 2:00 p.m.*

BREAK — *2:00 to 2:15 p.m.*

CONCURRENT SESSIONS & MICROSUMMIT — *2:15 to 3:15 p.m.*

BREAK — *3:15 to 3:30 p.m.*

CONCURRENT SESSIONS & MICROSUMMIT — *3:30 to 4:30 p.m.*

BIG DATA RECEPTION — *5:00 to 6:30 p.m.*
Sponsored by Acxiom

Wednesday, June 22

BREAKFAST — *7:00 to 8:00 a.m.*
Sponsored by Captricity

CONCURRENT SESSIONS & MICROSUMMIT — *8:00 to 9:00 a.m.*

REFRESHMENT BREAK — *9:00 to 9:30 a.m.*

CONCURRENT SESSIONS — *9:30 to 10:30 a.m.*

BREAK — *10:30 to 10:45 a.m.*

GENERAL SESSION — *10:45 to 11:45 a.m.*

The Future of Financial Decision Making Using Cognitive Computing
SRIDHAR IYENGAR
IBM Distinguished Engineer, Cognitive Computing Research
IBM Watson Research Center

CONFERENCE ADJOURNS — *11:45 a.m.*

CONCURRENT SESSIONS & MICROSUMMITS

Tuesday, June 21	*Choose One Concurrent Session or Microsummit*
10:30 to 11:30 a.m.	1.1 Advancing Underwriting Towards Instant Issue
	1.2 Experience: Now and Then
	1.3 Driving Positive Retirement Actions Through Predictive Analytics
1:00 to 2:00 p.m.	2.1 Please...Shed Some Light On This!
	2.2 Big Data Is Messy — That's Good!
	2.3 Partnering With Academia
	Microsummit — Getting Over Underwriting
2:15 to 3:15 p.m.	3.1 Explaining the Random Forest for the Random Trees
	3.2 Wisdom of the Crowd: Open Source Algorithms and Your Analytics Organization
	3.3 A Journey to the Future?
	Microsummit — The Elephant in the Room
3:30 to 4:30 p.m.	4.1 Integrating Predictive Analytics in Dashboard and KPI Development
	4.2 Life Meets Science — The Art of the Possible
	Microsummit — Thinking Outside the Cube
Wednesday, June 22	*Choose One Concurrent Session or Microsummit*
8:00 to 9:00 a.m.	5.1 Is Your Omni-Channel Marketing Approach Resonating With Your Customers? Use Nextgen Analytics to Find Out!
	5.2 From Customer Marketing to Claims: Social & Next-Generation Data Analytics' Impact Across the Policy Lifecycle
	5.3 Enabling Data Scientists and Protecting Data With Governed Data Discovery
	Microsummit — Gauging Your Performance
9:30 to 10:30 a.m.	6.1 From Data to Distribution
	6.2 Integrating Telematics Mobile Device Data Into Life Analytics
	6.3 LIMRA Analytics Town Hall

Big Data Analytics Conference
Concurrent Sessions & Microsummits

Microsummits are highly interactive discussion sessions limited to approximately 15 people. These sessions allow attendees to engage with each other and share ideas on hot topics regarding big data analytics.

Tuesday, June 21

CONCURRENT SESSIONS — *10:30 to 11:30 A.M.*

1.1 Advancing Underwriting Towards Instant Issue

Companies are actively addressing the consumer and seller experience within life insurance, specifically when it relates to the significant time and effort it takes to issue a policy. New data sources and data science hold promise for making instant or near instant decisions, eliminating the intrusive, costly and time consuming requirements traditionally utilized. This session will discuss the latest underwriting advancements being developed and used in the industry, how good the science is, and the regulatory and operational barriers that must be overcome to make automated underwriting a reality.

DAVID P. DORANS, CLU, Senior Vice President, Scor Global Life Americas; **DEREK MICHAEL KUEKER, FSA, MAAA,** Actuary, RGA; *Moderator:* **ERIC SONDERGELD, ASA, CFA,** Corporate Vice President, Strategic and Technology Research, LIMRA

1.2 Experience: Now and Then

What does it mean to capture experience? In this talk, Shelly Blake-Plock, CEO of Yet Analytics will describe how through a blend of the science of semantics and the application of tracking technologies to human performance metrics, a new branch of technology has developed which will have significant impact upon the way that individuals and businesses understand and leverage the data of experience. Focusing on how the experience of employees effects the outcomes of business, we'll examine how the data of experience is collected and made sense of; and how a better understanding of employee experiences may boost the capabilities of an organization. Surveying the current landscape of data technologies, we'll also look into the future and consider the consequences of what today's decisions about experience-based data models may ultimately have both for business and society with regards to privacy, communications, and emergent forms of artificial intelligence.

SHELLY BLAKE-PLOCK, President and CEO, Yet Analytics, Inc.

1.3 Driving Positive Retirement Actions Through Predictive Analytics

Voya Financial is using predictive modeling to deliver targeted messaging that drives thousands of positive customer actions every year. Using data from millions of customers, Voya's analytics engine helps to identify the best call to action for each individual, and then delivers that message by phone, web, or email. In this session, you will hear:

- How predictive modeling can be used to deliver targeted messaging that works

- How you can measure success, and use measurement to drive continuous improvement lessons learned about getting started, building a team, and maintaining momentum

TOM HAMILTON, Vice President, Head of Voya Financial's Center of Excellence, Voya Financial

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

2.1 Please…Shed Some Light On This!

What do you do with limited data? How can you use analytics to tackle business issues — simple and complex, small and large, core and non-core? Drawing on experience from implementing analytics solutions at carriers, Nirav Dagli, CEO of Spinnaker Analytics, will share lessons and best practices that drive insights through the use of predictive analytics spanning M&A, distribution, and operations. You are encouraged to submit questions ahead of time.

NIRAV DAGLI, Chief Executive Officer, Spinnaker Analytics

2.2 Big Data Is Messy — That's Good!

Big Data requires a mental shift: what we lack in cleanliness or completeness, we make up for in volume and variety. In many respects, partial data can tell us more than seemingly complete data. This paradigm shift lies at the heart of understanding how Big Data processing works and how Big Data yields business value.

BRIAN BERRY, Director, Technical Consulting, BlumShapiro Consulting; **DAVID BRADLEY,** EVP of Solution Management, R4 Technologies

2.3 Partnering With Academia

As companies seek out talent for their analytics initiatives, academia is rapidly evolving their curriculum to produce analysts with the requisite skill sets. Forward thinking companies are helping to shape this curricula by partnering with academia. Come and learn how one company has partnered with multiple universities to foster a pipeline for well-trained analysts.

SEARS MERRITT, Vice President, Data Science, MassMutual

MICROSUMMIT — Getting Over Underwriting

A follow-up to Session 1.1 and a discussion of advanced analytics and its role in underwriting.

CONCURRENT SESSIONS —*2:15 to 3:15 p.m.*

3.1 Explaining the Random Forest for the Random Trees

Predictive models provide insight that can be used to transform the insurance business. The challenge is, how do you communicate the results of very sophisticated tools and gain understanding from an audience that finds the topic complex and confusing.

- Learn tools and techniques to explain the results of predictive models
- Hear examples of how to present to different end-users of predictive models, both internal and external to your organization

DAVID MOORE, FSA, MAAA, Senior Technical Director, Nationwide

3.2 Wisdom of the Crowd: Open Source Algorithms and Your Analytics Organization

An increasing amount of data, affordable computational power and unprecedented access to a large number of algorithms to extract information from the data have increased the importance of analytics organizations like never before. The combination of the internet and a growing philosophy of sharing have led to open source implementation outpacing proprietary implementations. This session will provide a practical guide to adopting open source algorithms in an analytics organization. Using a publicly available dataset, attendees will learn how open source can be used to solve a business problem — end to end — from data exploration to model development and deployment.

SATADRU SENGUPTA, Data Scientist, DataRobot

3.3 A Journey to The Future?

Tomorrow for some is today for others! One re-insurer has grasped the future and its potential by creating powerful B2B2C solutions that are driven by emerging technologies such as smart analytics and the Internet of Things (IoT). These solutions allow data to facilitate services that meet the needs of clients and, ultimately, the end consumer. While some view these trends as potentially disruptive, Swiss Re will share their vision of how this evolution can be leveraged in an enterprise-transforming manner.

RICCARDO BARON, Ph.D., Big Data and Smart Analytics Lead Americas, Swiss Re

MICROSUMMIT — The Elephant in the Room

A follow up to Session 2.2 and other approaches to handling unstructured data.

CONCURRENT SESSIONS — *3:30 to 4:30 p.m.*

4.1 Integrating Predictive Analytics in Dashboard and KPI Development

The advances we have seen in recent years in data-focused tools and technology have opened doors to creating up to the minute views of the drivers of business performance and profitability. Companies can not only combine a multitude of data sources into a single view of current business activity and financial health but can also employ these data sources along with advanced statistical modeling techniques to create customer, agent and business quality/value scores. This session will discuss the types of new data and indicators being included in dashboard development and then present a template for a Management Dashboard for insurance products including key indicators of business performance developed using predictive analytics techniques.

MARK BIRDSALL, FSA, MAAA, CFA, Vice President, Lewis and Ellis; *Moderator:* **MARIANNE PURUSHOTHAM, FSA, MAAA,** Corporate Vice President, LIMRA

4.2 Life Meets Science — The Art of the Possible

The life insurance industry is ripe for disruption. To help manage this disruption, Data Science comes to the rescue. But the journey is not without challenges. This session will walk through the various places where Data Science can be embedded, discussing challenges and mitigation, and offering some practical solutions and best practices. The audience for this session is practitioners of Data Science. The session can get very technical.

VISHWA KOLLA, Assistant Vice President, Advanced Analytics, John Hancock

MICROSUMMIT — Thinking Outside the Cube

A discussion of partnering with academia, crowdsourcing, and other novel approaches to complementing your analytics staff.

Big Data Analytics Conference
Concurrent Sessions & Microsummits

Wednesday, June 22

CONCURRENT SESSIONS — *8:00 to 9:00 a.m.*

5.1 Is Your Omni-Channel Marketing Approach Resonating With Your Customers? Use Nextgen Analytics to Find Out!

The benefit of an ongoing, two-way dialog with highly engaged consumers is full of allure, but insurance marketers need to determine how to effectively measure ROI in this new model, which spans across online and offline marketing channels. In this session, we'll discuss what you need to know to shape your omni-channel marketing program and clearly understand its success. And, we'll answer some key questions:

- Do you have a 360-degree view of your customer, effectively tying on-line with off-line consumer attributes to engagement strategy?
- Is your digital marketing helping to improve your KPI's?
- How well do your digital marketing channels work with other channels? Which audiences are responding? Can you correctly measure and attribute their behaviors?
- Are valuable marketing dollars being wasted due to redundancy across channels?

STEPHEN DANCO, Vice President, Marketing, New York Life Insurance Company; **TODD PARSONS,** Vice President, Acxiom

5.2 From Customer Marketing to Claims: Social & Next-Generation Data Analytics' Impact Across the Policy Lifecycle

The utilization of data analytics for social media and next-generation data is disrupting the traditional insurance process, changing the way carriers market to and engage with customers, assess risk, and process claims. Traditional data sources, such as credit scores and contributory databases, no longer provide insurers with the whole story, particularly for millennials and individuals who typically fall into the "unscorable" category. Next-generation data targets this information gap, changing the way insurers conduct business and solving one of today's biggest industry challenges.

GEOFFREY ANDREWS, Chief Operating Officer, Social Intelligence

5.3 Enabling Data Scientists and Protecting Data With Governed Data Discovery

Data Scientists and Business Analysts have historically gone around IT to get their jobs done because of platform and tool limitations, as well as IT's black and white view of "applications." These users would pull data out of certified repositories and create copies of data on their desktops to blend with other data and make meaningful discoveries. They spend significant time on non-value add tasks and increase information risk. Through Governed Data Discovery, we can enable the business and reduce information risk.

TARA PAIDER, Assistant Vice President, IT Architecture-Strategy, Innovation and Architecture, Nationwide

MICROSUMMIT — Gauging Your Performance

Share your data visualization practices and get your questions answered.

CONCURRENT SESSIONS — *9:30 to 10:30 a.m.*

6.1 From Data to Distribution

Most salespeople don't have access to data or the tools to analyze it, manufacturers do. While many companies began their analytics work building lead generation and cross-sell programs, the types and sophistication of analytics being developed to support distribution continue to increase. Come to this session to hear what two companies are doing to support distribution.

SARAH HINCHEY, FSA, CERA, MAAA, Predictive Analytics Strategist, Milliman, Inc.; **MATTHEW OLSON,** Vice President, Customer Marketing & Analytics, Athene

6.2 Integrating Telematics Mobile Device Data Into Life Analytics

The frequency of the big data capture from mobile devices exposes the regularity of specific human behavior and represents a new frontier for Life Analytics, which hopefully can be used to adjust actuarial assumptions.

- The potential & speed bumps of innovation: (brief) presentations by Lexis Nexis, John Hancock, etc.
- Introducing mobile device & telematics data into the mix
- Customer acquisition — potential and limits of prospect targeting
- Underwriting — advancing "traditional" UW using predictive analytics and combining mobile data with current applicant data

- Four Steps to Dealing with telematics Big Data — meaningful summaries of data from mobile devices
- Data Privacy & Security: state and federal & regulatory environment

RAHIM RAJPAR, Assistant Vice President, Strategy and Business Development, John Hancock; **DELIN SHEN,** Senior Director, Risk Solutions, LexisNexis; **PATRICK SUGENT,** Vice President, Analytics Solutions, LexisNexis; *Moderator:* **MICHAEL MOCANU,** Assistant Vice President, Analytics and Technology Solutions, Lincoln Financial

6.3 LIMRA Analytics Town Hall

Do you still have questions that have not been answered? If so, join us at the LIMRA Analytics Town Hall where you will have a last chance to pose questions, discuss analytics strategies, and participate in a "Q&A hackathon"!

ERIC SONDERGELD, ASA, CFA, Corporate Vice President, Strategic & Technology Research, LIMRA; **JOHN WILSON, FLMI, AIRC, ACS,** Data Scientist, LIMRA

THANK YOU TO OUR CONFERENCE SPONSORS AND EXHIBITORS
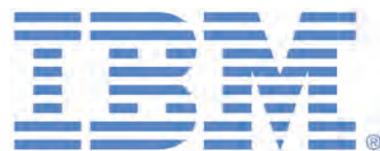
Conference Details

TO REGISTER

Register by May 24 and Save!

By May 24 (Conference & Seminar)
LIMRA Member: $1,890
LOMA (but not LIMRA) Member: $2,565
Nonmember: $3,235

By May 24 (Conference Only)
LIMRA Member: $1,195
LOMA (but not LIMRA) Member: $1,795
Nonmember: $2,390

After May 24 (Conference & Seminar)
LIMRA Member: $2,190
LOMA (but not LIMRA) Member: $2,990
Nonmember: $3,760

After May 24 (Conference Only)
LIMRA Member: $1,395
LOMA Member (but not LIMRA): $2,095
Nonmember: $2,790

REGISTER ONLINE: www.limra.com/bigdataconf

SPOUSES/GUESTS: A registration fee of $100 is available to spouses and guests of registered attendees. Individuals in an industry-related position, co-workers, or associates do not qualify. We invite spouses/guests to participate in the event's food and social functions and ask that they wear their badge to these events. Participation in the general sessions and workshops is limited to those who have paid the full registration fee to attend the conference.

MEETING ATTIRE: The dress code for this conference is casual.

HOTEL INFORMATION
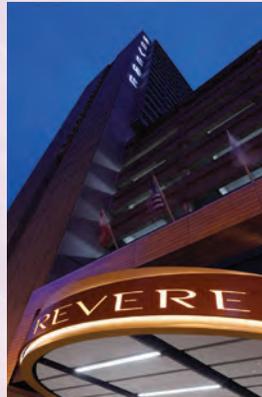
Revere Hotel
200 Stuart Street
Boston, MA
Phone: 1.855.673.8373

Please make your reservation using the link or by calling the reservations phone number and mention the LIMRA Big Data Analytics Conference by **May 24, 2016** to obtain the group rate of $289 single/double plus tax. Reservations made after **May 24, 2016** will be at the prevailing rate and based on space availability. The group guest room rate will be offered three days prior and three days after the meeting dates and subject to availability of rooms at the time of your reservation. Reservations must be guaranteed with a major credit card.

Check-in time is 4:00 p.m./check-out time is 11:00 a.m.

CANCELLATION POLICY

All cancellations must be received in writing. Cancellations received before May 27, 2016, will be refunded, less a $75 processing fee. Cancellations received from May 27, 2016, to June 10, 2016, will be refunded, less a $275 processing and administrative fee. No refunds will be issued after June 10, 2016.

In the event that a scheduled meeting or event is cancelled by LIMRA for any reason, LIMRA shall refund any conference registration fees that have been paid by the registrant. Under no circumstances, however, shall LIMRA be liable to the registrant for any other expenses including, but not limited to, airfare and hotel expenses incurred by the registrant.