

2024

**Enrollment
Technology
Strategy Seminar**

Ready for Innovation

**Back to the Future:
Lessons Learned**



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Remember Big Data?



Big Data was a session topic three years running from 2014- 2016...

- When you hear the term 'Big Data', what do you think of?
- Have we, as an industry, harnessed it? Ignored it? Acknowledged it and shrugged?
- What has the last ten years taught us about our ability to leverage data?

Industry Consolidation

Brokers buying
Tech

Carriers buying
Tech

PE buying
Brokers

Carriers buying
Carriers

Tech buying
Tech

Brokers buying
Brokers

Enrollment Firm
acquisitions

PE buying
Tech

1) Should we have seen this coming?

3) Are we (as an industry) better for it?

2) What has been driving this and will it continue?

4) What have we learned?

Tech Fees & Funding – How has this evolved?

- Technology and voluntary has created and accelerated this trend
- More tech = more requests?
- Discuss how this has evolved over time and where you think it's heading?
 - Regulatory environment, expectations for funding, competition for business, are we at a tipping point?

Enrollment Firms & Technology

- Personal enrollment support still important
- Enrollment firms approach to technology as part of their service offering
- Wait, I thought tech was going to replace enrollment firms? Discuss this assumption.
 - Technology adoption, enrollment firm services, decision support

- Thinking back, are we using APIs as much as you thought? Why or why not?
- Could it move faster? How?
- Where do you see APIs in the next 5 years?

Carrier Product Development Trends

- Did everyone see the move to more group products and/or residential build coming?
- Is this a result of carrier's creating more "tech-friendly" products?
- Is technology the reason? Is technology geared toward serving group products?
- What's next?

Decision Support

- In the early days, when decision support was envisioned, do you think it was what we see today?
- What does the customer experience look like?
- Has decision support gone too far? Not far enough?
- What's next?

Table Activity – 15 minutes

- At each table, there will be packet of materials as a point of reference. On top, there will be the topic assigned to your group.
- Each group should review and discuss amongst themselves their thoughts on the questions / topics.
- A narrator from each table will report back to the larger group on the high points of the discussion.

Summary of Topics

- Remembering Big Data?
- Industry Consolidation
- Tech Fees & Funding
- Enrollment Firms & Technology
- API Development
- Carrier Product Development Trends
- Decision Support

Thank You



Navigate With Confidence

Session Requirements

- 1 – 2 crowd mics
- 3 speaker mics
- Packets at tables (I.e. Copy of Powerpoint)
- Committee member at each table?