



2024
**WORKPLACE
BENEFITS
CONFERENCE**

**Era of
Innovation**

**Effective Sales
Strategies to Thrive
Amid Digital
Transformation**



Susmitha Kakumani

*Partner, Customer Experience
Strategy & Transformation*
PWC



Catherine Ratcliffe

CEO & Founder
STR Benefits Consulting



Jill Schlofer

2nd VP, Implementation & Enrollment
The Standard



Phil Trzcinski

*Director Distribution Strategy and
Execution*
Transamerica

Polling Question

My organization is effective at communicating the value proposition of digital transformation?

1. Strongly Agree
2. Agree
3. Neutral
4. Disagree
5. Strongly disagree

Companies across all industries are talking about digital and putting it at the center of their messaging

Digital vision statements promote

- ✓ Collaboration with customers
- ✓ Adaptability to changing needs
- ✓ Ease of use & effectiveness
- ✓ Connection to the modern workforce
- ✓ Trusted & personalized digital experiences
- ✓ Differentiated products and solutions

We offer innovative digital capabilities that **focus on customer needs** and enhance the participant **education and user experience** through all life stages

We create solutions that **adapt** to the **changing needs of organizations**. From boosting performance through employee health and wellbeing programs to building **bespoke solutions** that provide for a secure retirement, we make sure our clients are **better informed and better advised**, so that they can make **better decisions** for their workforce. Whatever the next decade brings

We believe technology can and should be a **force for good** and that **meaningful innovation** can and will contribute to a **brighter world** in big and small ways

We believe in **collaboration**: putting our heads **together with customers** to drive business forward and identify pain points – then **acting with agility** to solve them. Together, we **accelerate emerging ideas** into real solutions that deliver services and scale while creating **meaningful customer experiences**

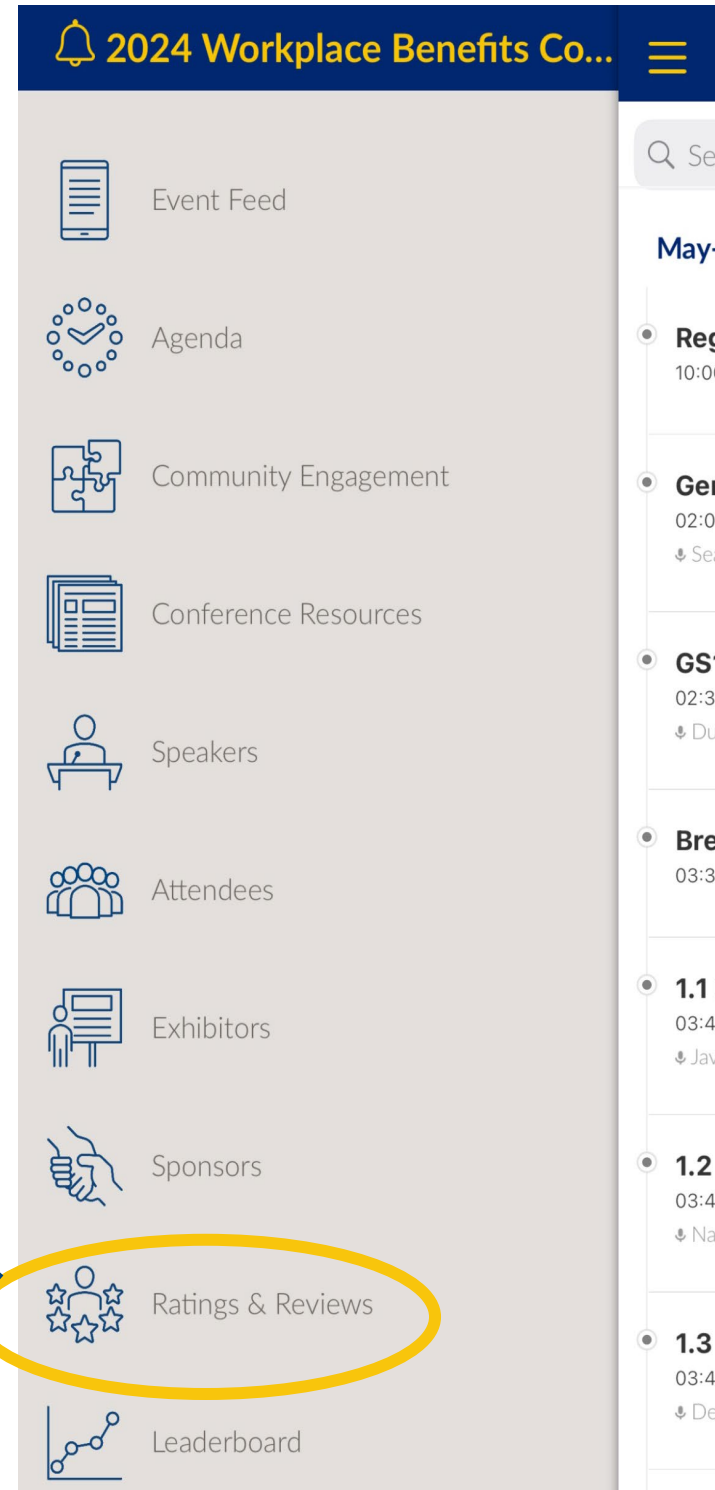
Carriers face many strategic, operating model, and cultural roadblocks to driving digital adoption

Digital Adoption Framework

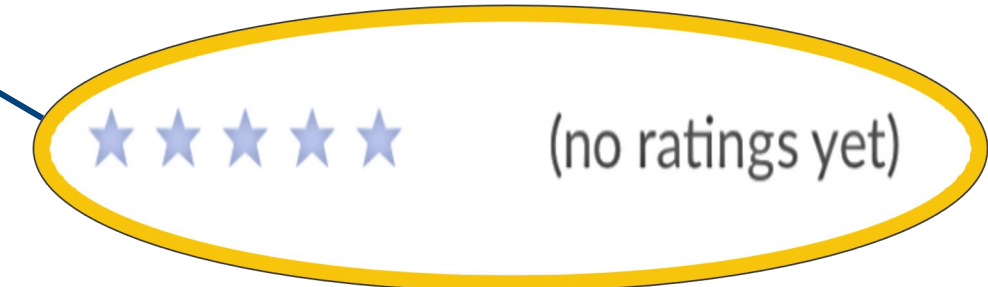
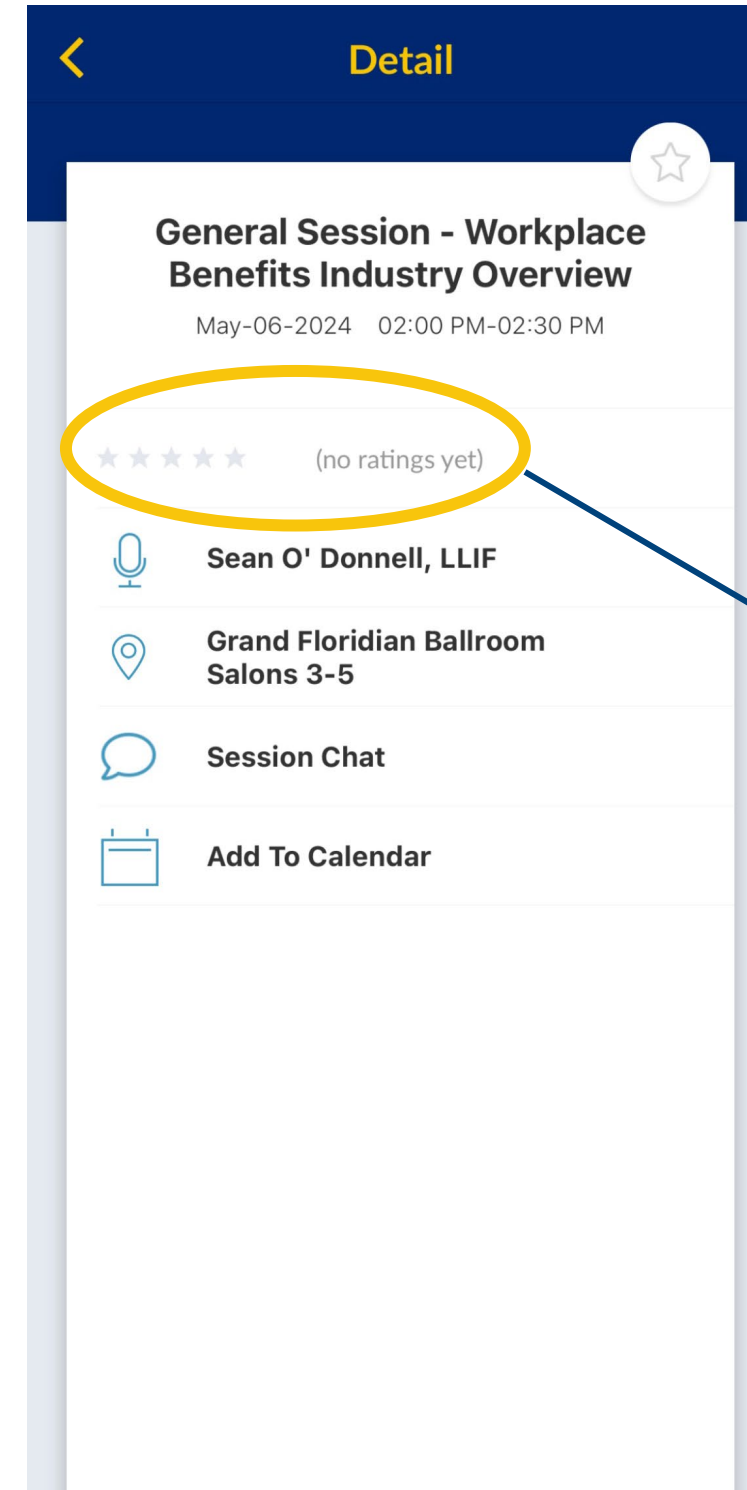
Operating Model	1 Interaction Model	<ul style="list-style-type: none"> • There are various stakeholders and functional areas involved in driving digital adoption, but there is no clear ownership, accountability or decision rights • There is no standard, well-defined, or documented current state process for stakeholders to follow to drive digital adoption and ensure leaders are held accountable
	2 People & Talent	<ul style="list-style-type: none"> • There are some key skill and talent gaps that need to be addressed via training or upskilling to drive digital adoption
Strategy	3 Business Case & Benefits Realization	<ul style="list-style-type: none"> • Stakeholders recognize the importance of a robust business case, but the approach can be top-down and not fully effective at supporting strategic, data-driven decision-making • Driving digital adoption and monitoring the overall value (i.e., benefits realization) requires access to robust data which may be lacking and/or difficult to source in the current state
	4 Strategy & Planning	<ul style="list-style-type: none"> • Leadership invests in building leading digital assets, but each asset is at a different point in its capability maturity journey • While driving adoption of digital assets is critical to maximizing strategic value, adoption requires a holistic view into the overall product portfolio
Culture	5 Leadership & Vision	<ul style="list-style-type: none"> • Lack of unified approach or process to drive digital adoption • Cultural challenges around trust, accountability, and transparency emerge as roadblocks in driving digital adoption

We Want to Hear From You. Leave a Rating & Review.

Module Option



Agenda Option



Thank You

