

# P R O G R A M

## 2015 Marketing & Research Conference

MAY 27 – 29, 2015 • FOUR SEASONS HOTEL • BALTIMORE, MD



***Connect. Innovate. Transform.***

- **CONNECT:** Come together to share new ideas
- **INNOVATE:** Discover emerging concepts and approaches
- **TRANSFORM:** Effect change for continued relevance and success

**LIMRA**<sup>®</sup>



# MARKETING & RESEARCH WORKSHOPS

Please use this as a reference to select one workshop from each time period.

		Product, Sales & Distribution	Marketing Communications	Digital Marketing	Research Approaches	Customer Insights	Strategic Issues
<b>Wednesday</b>							
2:45 to 3:45 p.m.	1. Connect and Transform Your Content Marketing <i>(Cobalt I)</i>	◆	◆	◆			
	2. Navigating Neuroscience: Your Roadmap of Emotional Measurement Techniques <i>(Cobalt II)</i>				◆	◆	
	3. Design Thinking for the Real World <i>(Indigo)</i>				◆	◆	◆
	4. Health Care Reform Reshapes Ancillary Products <i>(Marine)</i>	◆					◆
4:00 to 5:00 p.m.	5. Two Views of Predictive Analytics <i>(Indigo)</i>				◆	◆	◆
	6. Now It's Time to <b>Deliver</b> Your Content... to Your Financial Representatives <i>(Cobalt I)</i>	◆	◆	◆			
	7. Millennial Mindset <i>(Cobalt II)</i>		◆			◆	
	8. Positioning Your Marketing Team for Results <i>(Marine)</i>						◆
<b>Thursday</b>							
10:30 to 11:30 a.m.	9. Social Media Makeover — Personalizing Social Media to Build Customer Relationships <i>(Cobalt II)</i>		◆	◆		◆	
	10. The Customer Experience: Where and What Do You Measure? <i>(Cobalt I)</i>				◆	◆	
	11. Year 2025: What Concepts Will Engage Gens X, Y, and Z? <i>(Indigo)</i>	◆				◆	◆
	12. Overcoming "TMI": How to Search With Confidence <i>(Marine)</i>				◆		
1:00 to 2:00 p.m.	13. Transform Customer Focus Into Customer Experience <i>(Cobalt II)</i>			◆		◆	◆
	14. Analyze This! Understanding Social Media Analytics <i>(Indigo)</i>			◆			
	15. In a Research Rut? Explore Techniques That Will Transform Market Research! <i>(Marine)</i>				◆	◆	
	16. Speak My Language: Understanding the Consumer Through Various Life Stages <i>(Cobalt I)</i>		◆			◆	
2:15 to 3:15 p.m.	17. Right Message, Right Customer, Right Time: Connect On Their Terms! <i>(Cobalt I)</i>	◆		◆			◆
	18. The Mysteries of Life <i>(Marine)</i>	◆				◆	◆
	19. "Click to Connect" — Websites for Today's Consumer <i>(Indigo)</i>			◆		◆	
	20. Connect the Dots for Your Audience Through Infographics <i>(Cobalt II)</i>		◆		◆		
<b>Friday</b>							
8:15 to 9:15 a.m.	21. Producers Get Social <i>(Cobalt I)</i>	◆		◆			
	22. Lessons From History: Learning About Strategy From the Battle of Gettysburg <i>(Cobalt II)</i>						◆



# marketing & research conference

## Wednesday, May 27

**MEET AND GREET — 1:30 to 2:00 P.M.**

*Grand Ballroom Foyer*

Join us as the conference begins to meet and greet peers while you share ideas and common experiences.

**GENERAL SESSION — 2:00 to 2:35 P.M.**

*Grand Ballroom*

### Marketing Baltimore's Transformation and Tourism Experience



**TOM NOONAN**  
President and CEO  
Visit Baltimore

Baltimore is buzzing. Investments are being made to the Inner Harbor, downtown, and surrounding neighborhoods. An impressive schedule of special events and conventions is attracting visitors year-round. As the city's official DMO, Visit Baltimore has invested in sales and marketing initiatives to leverage the changes that are taking place and increase the city's competitive position. Come learn about these initiatives and allow the spirit of Baltimore's revitalization to stimulate your company's innovation and transformation!

**BREAK — 2:35 to 2:45 P.M.**

*Grand Ballroom Foyer*

**CONCURRENT WORKSHOPS — 2:45 to 3:45 P.M.**

*Cobalt I*

#### 1. Connect and Transform Your Content Marketing

"One size fits all" doesn't apply to marketing. Understanding your sales process and connecting with distribution will help you tailor your message to suit the effective sales practices of your organization. Learn how to create content that interests your client/prospect and engages the field. Hear how concierge service and a go-to-market plan take a marketing piece from plan to concept to launch — and result in a successful program.

**SARAH HEDGES, CFP, CLU, ChFC**, Life Sales National Program Manager, MassMutual; **Moderator: MAT NELSON**, Marketing Consultant, MassMutual

*Cobalt II*

#### 2. Navigating Neuroscience: Your Roadmap of Emotional Measurement Techniques

Looking to enhance your current approaches with a new perspective on the emotional whys behind consumer behavior? This session will provide a guide to navigating the exciting and innovative area of neuroscience-based consumer research.

- Learn how to choose the right neuro tool for your research objective
- Through case studies and practical examples, gain insight into how companies are applying these techniques to better understand the drivers behind consumer behavior and to inform business decisions

**JESSICA REITER**, Senior Vice President, Neuroscience & Emotion, Ipsos; **Moderator: DEBBIE SIMMONS**, Assistant Director, The Hartford Financial Services Group

*Indigo*

#### 3. Design Thinking for the Real World

Want to utilize Design Thinking principles in your job but worried you don't have the time or support to do so? Applying Design Thinking theory in your marketing and research activities can be simpler than it seems. You don't have to rework your entire department structure or totally transform your processes to do so. Come learn some quick and simple ways to start applying the steps of empathy, definition, ideation, prototyping, and testing in your work today.

**LANCE POOLE**, Founder, d. behavior; **ALISHA REED, FLMI**, Vice President, Marketing Strategy, Protective Life Insurance Company; **Moderator: TERI SCHULTZ**, Vice President, Marketing, Protective Life Insurance Company

*Marine*

#### 4. Health Care Reform Reshapes Ancillary Products

Are you seeing an impact of the Affordable Care Act (ACA) on your benefit plans? We want to help answer your questions and show you market trends in ancillary products. We will have a Q&A session where you can ask two experts your questions, and we will touch on three important impacts of ACA on benefits: 1) ACA impact to small group ancillary purchasing, 2) growth of voluntary sales (pros/cons), and 3) private exchanges (pros/cons).

**KATE McCOWN**, Second Vice President, Group Compliance, Ameritas Life Insurance Corp.; **TRACIE FOSTER**, Director, Product Management/Business Development, Anthem Life Insurance Company; **Moderator: NATALIE BARENTHIN**, Senior Marketing Research Analyst, Anthem Life Insurance Company



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**REFRESHMENT BREAK** — 3:45 to 4:00 P.M.

*Grand Ballroom Foyer*

**CONCURRENT WORKSHOPS** — 4:00 to 5:00 P.M.

*Indigo*

## 5. Two Views of Predictive Analytics

Come discover two approaches to applying predictive analytics in the financial services industry:

- Learn how LIMRA and the University of Connecticut created a process to collaborate on predictive modeling and forecasting projects. Walk away with a roadmap for how to approach an academic institution, expectations, obstacles, and the benefits of partnering. In addition, be introduced to a project just completed by UConn students in partnership with LIMRA.
- Hear how LIMRA has been using predictive analytics for over 75 years to make predictions regarding the success potential of candidates for financial services sales positions. We will outline the process involved in developing our predictive assessments and the impact they have had on the industry.

**RICHARD A. FUNKE, LLIF**, Assistant Vice President, Assessment and Development Solutions, LIMRA; **JOHN R. WILSON, FLMI, AIRC, ACS**, Data Scientist, LIMRA; *Moderator: RITA LEPORE*, Senior Client Analytics Specialist, Great-West Life, London Life & Canada Life

*Cobalt I*

## 6. Now It's Time to Deliver Your Content... to Your Financial Representatives

This session picks up where "Connect and Transform your Content Marketing" left off. Now that you can create the best content ever, how do you effectively communicate it to those who sell your products? Learn several tips to help you package your content assets and reach your distributors.

**ANGELA MEEHAN, CLU, ChFC, RFC**, Vice President, Variable Product Marketing, Ohio National Financial Services; **MICHELLE RAHTZ**, Consultant and Team Lead, Life Marketing, Ohio National Financial Services; *Moderator: MAT NELSON*, Marketing Consultant, MassMutual

*Cobalt II*

## 7. Millennial Mindset

Do you want to reach the most influential American generation? Then it's time to get into the heads of Millennials. With 80 million in their ranks, Millennials (aka Generation Y) are unlike other generations. Greg Vodicka, from FutureCast, will share new research and best practices in creating engagement with Millennials.

FutureCast will cover:

- Major millennial trends and strategies that win with this audience
- Brands that are winning and losing and why
- Best practices you can apply to your business

When you leave, you will have leading ways to connect with Millennials.

**GREG VODICKA**, Millennial Consultant, FutureCast; *Co-Moderators: LEANNE DRIVES, FLMI, ACS*, Senior Market Research Project Manager, Northwestern Mutual; **MARTIE ZOOR**, Senior Analyst, Group Benefits and Consumer Insights, Lincoln Financial Group

*Marine*

## 8. Positioning Your Marketing Team for Results

For the leaders of today and tomorrow. What are the "art and science" skills required for team members in today's world? What are the strategic and tactical skills and training critical for developing your highly successful marketing team for tomorrow? And, as a leader, how will you facilitate this critical growth and development? How can you effectively convey the value of marketing to your stakeholders? Come and find the answers to these questions and more.

**SHELLEY WEST**, Director, of Advisory Services, CEB; *Moderator: SHELLY OLSON*, Manager, Group Insurance Marketing, MetLife

**LIMRA RECEPTION** — 6:00 to 7:00 P.M.

*Grand Ballroom Foyer*



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## Thursday, May 28

**CONTINENTAL BREAKFAST** — 7:15 to 8:15 A.M.

Grand Ballroom Foyer

**GENERAL SESSION** — 8:15 to 10:00 A.M.

Grand Ballroom

### **Strategy for Success: The Research and Planning Behind Big Marketing Ideas**



**ANN GLOVER**  
Chief Marketing Officer  
Voya Financial

Voya Financial's CMO, Ann Glover, has much to talk about. The company recently completed an enterprise-wide rebranding effort, debuted a new, national advertising campaign, and launched the Voya Born to Save™ program to build consumer awareness of the Voya name. Glover will kick off this year's Marketing & Research Conference discussing Voya's "Big Ideas" of 2014, the due diligence, planning and research behind these initiatives, and how the company plans to continue its momentum in 2015.

### **The Thrills and Spills of Sports Marketing**



**PAM EL**  
Chief Marketing Officer  
National Basketball Association

The National Basketball Association is among the gold standards in the world of professional sports. As its CMO, Pam El knows how research and planning can be used effectively to position this global brand in today's competitive sports environment. Pam has over 30 years of marketing experience, many of them in financial services, and in her talk she will discuss the strategies she's developed for successful outcomes. Listen to how her marketing expertise can apply to our industry and help you connect to today's consumers.

**REFRESHMENT BREAK** — 10:00 to 10:30 A.M.

Grand Ballroom Foyer

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

Cobalt II

### **9. Social Media Makeover — Personalizing Social Media to Build Customer Relationships**

Help your agents connect in innovative ways to transform customer engagement. This session will focus on creating effective content for agent use in social media. Hear two unique perspectives on how to make content development more fun and less painful, including best practices, overcoming issues within your organization, and real-life examples of effective social campaigns.

**CORI SCHMID**, Social Media & Online Marketing Manager, Mutual of Omaha; **KYLE MARIE WOODS**, Marketing Manager, Advisor Marketing, Thrivent Financial; **Moderator: ANN FREEMAN**, Director of Marketing, Allstate Insurance Company

Cobalt I

### **10. The Customer Experience: Where and What Do You Measure?**

Customer Experience Measurement continues to be a strategic focal point for the financial services industry. However, limitations in applying existing measures to the life insurance industry are leading many to ask for new approaches. In this session, you will hear not only about the limitations of frequently-used metrics, but more importantly about LIMRA's approach to measuring the Customer Experience in the life insurance industry.

**PHIL BROWN**, Senior Product Manager, LIMRA; **TODD SILVERHART, Ph.D.**, Director, Insurance Research, LIMRA; **Moderator: CAROLINE BEHUNIAK**, Research Director, Voya Financial



# marketing & research conference

Indigo

## 11. Year 2025: What Concepts Will Engage Gens X, Y, and Z?

Fast forward 10 years into the future — you're the new CMO of ABC Insurance Company. How will you transform the way you engage Gens X, Y, and Z to drive your company's sales growth? What are the sales concepts producers will utilize that resonate with these consumers, and how will they need to switch from "teacher to triage nurse" while watching many other carriers go direct? Forget the Boomers — how can we all help launch their children and grandchildren into financial well-being?

**NILUFER AHMED, Ph.D.**, Senior Research Director, Insurance Research — Markets, LIMRA; **BRYAN DAVIS, CFP, CLU, ChFC**, Advanced Sales Consultant, The Guardian Life Insurance Company of America; **RICHARD M. WEBER, CLU, AEP®**, President and CEO, The Ethical Edge, Inc.;  
*Moderator: SHAWN C. SMITH*, Director, Life Insurance Product Marketing, The Guardian Life Insurance Company of America

Marine

## 12. Overcoming "TMI": How to Search With Confidence

The Internet holds a wealth of information — more and more each day — but it's not always easy to find the *right* information. If done correctly, searching can be effective, but often we are left sifting through piles of results, wondering if sources are reputable and feeling overwhelmed. This workshop will examine how to make the most of your Internet searches, review results effectively, and create valuable end deliverables.

**AMY PLYMPTON, MLIS**, Corporate Vice President, Communications, LIMRA; *Moderator: LEANNE DRIVES*, Senior Market Research Project Manager, Northwestern Mutual

**LUNCHEON** — 11:30 A.M. to 12:40 P.M.

Grand Ballroom

## Breaking the Shackles of Conventional Thinking to Spark Creativity and Innovation



**BRIAN KLAPPER**

President and Founding Partner  
The Klapper Institute

Groundbreaking ideas are no longer a luxury when success is contingent upon an organization's ability to adapt, innovate and improve. We need to look no further than Kodak, Sears, or Sony for validation that status-quo thinking is the fast-track to decline. How, then, can organizations break free of conventional thinking to spark creativity? The first step is to consider the way you have always done business — and stop. Failing to do so not only prevents truly innovative thinking; it also ensures failure. Come hear how to develop a wellspring of new ideas created from a series of non-traditional interactions.

**BREAK** — 12:40 to 1:00 P.M.

**CONCURRENT WORKSHOPS** — 1:00 to 2:00 P.M.

Cobalt II

## 13. Transform Customer Focus Into Customer Experience

Understanding how to positively transform your customer's journey involves many moving parts. Customers have different needs, preferences, and behaviors, and it is critical that we understand how they make decisions and interact with us. In this session, we will:

- Identify best practices for defining customer segments
- Review the channels and approaches insurers take to impact customer experience, including digital
- Explore challenges insurers face when attempting to transform customer experience

**PETER BROWN, CLU**, AVP, Digital Marketing, Western & Southern Life; **JASON KAPEL**, Manager, Customer Experience, Prudential; *Moderator: AZIZA ALEXANDER*, Director, Industry & Competitive Intelligence, Prudential



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*Indigo*

#### 14. Analyze This! Understanding Social Media Analytics

Attend this session to learn how to use key social media metrics to enhance and direct your communications to your targeted audiences. You will walk away with ideas to help you determine which metrics may be most beneficial to your company, how to measure success with social media, and how to make adjustments based on the metrics.

**DANA LYNCH**, Director of Digital Marketing, OneAmerica Companies; **KYLE MARIE WOODS**, Marketing Manager – Advisor Marketing, Thrivent Financial; *Moderator:* **STEVE WENDORF**, Director of Marketing, Catholic United Financial

*Marine*

#### 15. In a Research Rut? Explore Techniques That Will Transform Market Research!

Do you find yourself using the same methodologies time and time again? Discover innovative methodologies — *Gamification and Facial Coding* — and their practical application.

- Explore these nontraditional research techniques infrequently used within the insurance space; and
- Learn about the potential for different insights gained from utilizing these uncommon methodologies.

**DAN HILL**, President, Sensory Logic; **JOSH KAMOWITZ**, Associate Vice President of Business Development, BrainJuicer; *Moderator:* **KENIA COLLINS**, Director, Research Solutions and Management, MetLife

*Cobalt I*

#### 16. Speak My Language: Understanding the Consumer Through Various Life Stages

Did you know that 14 percent of Millennials like getting text messages from brands? Or that when asked about factors that impact a child's well being, Gen X and Baby Boomer moms are more likely to list finances as a concern than younger moms? Join Mintel Comperemedia as we explore how brands are communicating with consumers at different stages of life, how attitudes differ between consumer groups, and how companies market to them.

**STEPHANIE ROY**, Senior Industry Analyst, Mintel Comperemedia; *Moderator:* **MICHAEL GRECO**, Research Director, Gerber Life Insurance Company

#### REFRESHMENT BREAK — 2:00 to 2:15 P.M.

*Grand Ballroom Foyer*

#### CONCURRENT WORKSHOPS — 2:15 to 3:15 P.M.

*Cobalt I*

#### 17. Right Message, Right Customer, Right Time: Connect On Their Terms!

Now that you have a CRM and marketing platform in place, how will you generate an ROI? In this session, you will receive invaluable insight from managers who recently implemented a successful marketing platform. You will walk away with:

- Insight from marketing and sales managers regarding platform selection, implementation, and utilization
- The keys to generating ROI from a marketing platform
- Handouts include suggested performance measures and a "must-do items" checklist

**KATIE BARTLING**, Manager, Marketing Communications, Midland National Life; **PAM ELHOFF**, Second Vice President, Sales Development, Midland National Life; *Moderator:* **BRAD ROSENBLATT**, Vice President, Sales and Marketing, Sammons Financial Group/Midland National Life

*Marine*

#### 18. The Mysteries of Life

Is the motivation to shop for life insurance the result of careful deliberation of the pros and cons and a rational consideration of risk? The field of behavioral economics suggests otherwise. Instead, like most human behavior, consumer receptivity to life insurance is likely driven by quick, automatic responses. Come hear the results of new research in which LIMRA turned to the subconscious for some answers:

- How do consumers really feel about life insurance ownership?
- What emotional benefits do people want from life insurance?
- What type of messaging might increase their likelihood to purchase the product?

**JENNIFER DOUGLAS**, Associate Research Director, LIMRA; **KIMBERLY LANDRY**, Analyst, LIMRA; *Moderator:* **SARAH EHLINGER**, Research Manager, Principal Financial



# marketing & research conference

*Indigo*

## 19. "Click to Connect" — Websites for Today's Consumer

How are companies designing websites with today's consumer in mind? How do they leverage social media to drive traffic to their public site? Learn the top trends to drive consumers to your website. We will review design elements and content of leading companies.

**CINDI EMERICK**, Webmaster, The Baltimore Life Companies;  
**BEN PRITCHARD**, Interactive Technology Director, Garrison Hughes;  
**ERIC SONDERGELD, ASA, CFA, MAAA**, Corporate Vice President, Distribution & Technology Research, LIMRA;  
*Moderator: SARAH HAMILL, CLU, ChFC, MSFS, CASL*, Marketing Director, Nationwide

*Cobalt II*

## 20. Connect the Dots for Your Audience Through Infographics

Infographics are a great way to make data digestible for audiences by simplifying the story. Despite their simplicity, creating successful infographics is far from a simple task. This session will cover all aspects of infographics, including case studies (what works, what doesn't), how to build them (tools and techniques), and best (and worst!) practices for using infographics to tell your story and connect the dots for your audience.

**JOSEPH HOPPER, Ph.D.**, President, Versta Research;  
**KRISTI WICK**, Digital Media Coordinator, America's Health Insurance Plans; *Moderator: JESSICA KANE*, Market Research Manager, Unum

## REFRESHMENT BREAK — 3:15 to 3:45 P.M.

*Grand Ballroom Foyer*

## GENERAL SESSION — 3:45 to 4:45 P.M.

*Grand Ballroom*

### Transform Your Talks



**MARY MILLA**

*Founder*

*What's Your Point? Training*

Most professionals are very good at what they do, but struggle to explain what they do — especially through PowerPoint communications. Mary's mission is to rid the business world of buzzword-filled presentations and aimless meetings. She will show you a time-saving method to transform your talks into communication that will advance your ideas, engage your audience, keep your bosses' attention, and build your personal brand.

## DINE AROUND (OPTIONAL) — 6:00 P.M.

What better way to network with your fellow conference attendees than to dine at a local restaurant without the bother of making the reservations? LIMRA will manage the reservations for small groups. Restaurant sign-up sheets will be posted near the conference registration area.



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## Friday, May 29

**CONTINENTAL BREAKFAST** — 7:15 to 8:15 A.M.

Grand Ballroom Foyer

**CONCURRENT WORKSHOPS** — 8:15 to 9:15 A.M.

Cobalt I

### 21. Producers Get Social

Our agent panel talks about how they're making social media a core part of their marketing activities — making connections, building awareness, and finding sales opportunities. You'll hear what works, what doesn't, and what producers need from you to make it all happen.

**BETH FISH**, Agent, American National; **CARLOS SANCHEZ**, Agent, Premier Agency, Allstate Insurance Company;  
*Moderator: SCOTT CAMPBELL*, Executive Vice President, Chief Marketing Officer – Multiple Line, American National

Cobalt II

### 22. Lessons From History: Learning About Strategy From the Battle of Gettysburg

Over the years, many have studied the military strategies employed by the Union and Confederate armies in the days leading up to, during, and following Gettysburg. What can marketers and market researchers learn from this storied event? We will explore such lessons as:

- What is strategy, and how can a better understanding of strategy lead to more-insightful research results?
- How can military strategies be applied to the battle for the hearts and minds of customers?

**JULIE BROWN**, President, The Center for Strategy Research, Inc.; **KENIA COLLINS**, Director, Market Intelligence, MetLife;  
*Moderator: AUDREY BLAIR-GENTRY*, Sr. Market Research Analyst, Western & Southern Financial Group

**EXHIBITOR RAFFLE AND REFRESHMENT BREAK**  
— 9:15 to 9:45 A.M.

Grand Ballroom Foyer

**GENERAL SESSION** — 9:45 to 11:30 A.M.

Grand Ballroom

### From Outputs to Outcomes: Shifting the Way We Measure Success



**MARIA FERRANTE-SCHEPIS**  
*Managing Principal,  
Insurance & Financial Services  
Maddock Douglas*

This session will discuss the widening gap between consumer perceptions and the industry's intentions, and how the roles of marketing and research are critical in transforming the way we think about closing it. As a former insurance marketing executive, turned innovator, Maria will discuss how the consumer demand for a great experience drives the need for better insight, innovative solutions, and new measurements.

For those in marketing roles, this session is intended to inspire a redefinition of purpose and impact. For those in research roles, this session will help you design new metrics that unify teams around what's most important.

### New Ideas for Financial Services: Innovative Solutions From Other Industries



**ALISON SALKA, Ph.D.**  
*Senior Vice President  
and Director of Research  
LIMRA*

Marketing and research are critical to long-term growth and success. And both of these areas are transforming due to changing consumer needs and evolving technology. Come to this session to understand how insights from other disciplines like journalism, politics, and even neuroscience — a multidisciplinary field comprising subjects as diverse as biology, psychology, medicine, physics, and linguistics — can help improve marketing and research strategies in our industry.

**ADJOURNMENT** — 11:30 A.M.



## general session speaker biographies

### **PAMELA EL**

*Chief Marketing Officer  
National Basketball Association*

Pamela El is responsible for the NBA's global marketing operation, directing brand development, overall marketing, and advertising for the NBA, WNBA, and NBA Development League. With more than 30 years of experience, El is widely recognized as an industry leader for her expertise in brand management, marketing strategy, creative development, and media and sponsorships. Prior to joining the NBA in 2014, El served as Senior Vice President of Financial Brand Marketing for Nationwide Insurance. Earlier, El spent over a decade with State Farm Insurance, where she led sales and marketing strategy for the U.S. and Canada. She earned a bachelor's degree in mass communications from Virginia Commonwealth University. She lives in New York City with her husband.

### **MARIA FERRANTE-SCHEPIS**

*Managing Principal, Insurance & Financial Service  
Maddock Douglas*

More than 25 years as an executive in insurance and financial services at firms like Guardian and Prudential give Maria Ferrante-Schepis a unique focus on the most important opportunities for innovation. Her mission is to enable like-minded executives to shape their own change versus having it shaped for them. She identifies, examines, and provides an innovation road map to take advantage of opportunities in key areas — topics that are not only appropriate for executives in marketing, sales, and product, but also very helpful for corporate support leaders such as legal, compliance, and human resources.

### **ANN B. GLOVER**

*Chief Marketing Officer  
Voya Financial*

Ann Glover is the chief marketing officer for Voya Financial. In addition to leading the company's rebranding effort, she oversees all corporate strategic marketing activities, including brand development, advertising, digital and social strategy, sponsorships, market research, data analytics and consumer insights, and business marketing. Glover joined the company in 2008 after seven years with The Hartford Financial Services Group Inc., where she served as the company's group senior vice president of corporate relations and chief marketing officer. Prior to The Hartford, Glover spent 13 years in key marketing leadership roles for PepsiCo Inc. Glover holds a Bachelor of Arts degree in biology from St. Michael's College in Vermont and an MBA from Northeastern University in Boston.

### **BRIAN P. KLAPPER**

*President and Founding Partner  
The Klapper Institute*

Brian is an expert in operational and cultural transformation, as well as a speaker and writer. He has worked with international companies in a variety of sectors, including financial services, consumer products, manufacturing, food service, utilities, retail, and health care. He focuses primarily on helping his clients create a culture of execution excellence, and holds a bachelor's degree from Cornell University and an MBA from the University of Pennsylvania Wharton School.

### **MARY MILLA**

*Founder  
What's Your Point? Training*

Mary Milla's mission in life is to rid the business world of dull, lengthy, buzzword-filled presentations. She teaches clients how to translate their expertise into material that's engaging, understandable, and persuasive. Milla's 20-year career in public relations, state government, and TV news taught her that good stories and information often get lost in a lot of muck. Her method is easy and practical, designed to help busy professionals quickly prepare presentations and get back to their real jobs.

### **TOM NOONAN**

*President and CEO  
Visit Baltimore*

With over 25 years in marketing and hospitality, Tom is responsible for promoting awareness of the Baltimore region as a travel and meetings' destination. He joined Visit Baltimore as president and CEO in January 2007, and under his leadership, the city has increased its competitive position. Previously, Tom spent 18 years at the Dallas Convention and Visitors Bureau. He is a graduate of Luther College in Iowa.

### **ALISON SALKA, Ph.D.**

*Senior Vice President and Director of Research  
LIMRA*

Alison Salka is responsible for determining and implementing the strategy and direction of LIMRA's global research program. She oversees a team of more than 80 researchers and other staff professionals working in LIMRA's research division who conduct consumer research, benchmark studies, and white papers focused on helping member companies better understand industry issues and trends. She is also a director of the LIMRA LOMA Secure Retirement Institute.



# committees



## THE MARKETING COMMITTEE

### *Chair*

**JAMES DELUCA, LLIF, CIC**, Western & Southern Financial Group

### *Vice Chair*

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### *Members*

**AZIZA ALEXANDER**, Prudential

**MARK BERMES, CLU, ChFC, LLIF, FLMI**, Mutual Trust Financial Group

**SCOTT CAMPBELL**, American National

**JAY DONNELLY**, Great West Life Insurance Company

**MICHELLE FISCHBACH**, Voya Financial

**ANN FREEMAN**, Allstate Life & Retirement

**SARAH HAMILL**, Nationwide Financial

**ANGELA MEEHAN, CLU, ChFC, RFC**, Ohio National Financial Services

**MAT NELSON**, MassMutual Life Insurance Company

**SHELLY OLSON**, Metropolitan Life Insurance Company

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**TERI SCHULTZ**, Protective Life Insurance Company

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### *Staff Representative*

**DONNA ERICSON**, LIMRA

## MARKETING RESEARCH CONFERENCE COMMITTEE

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**CAROLINE BEHUNIAK, MBA, CFA**, Voya Financial

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**AUDREY BLAIR-GENTRY**, Western & Southern Financial Group

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**MICHAEL GRECO**, Gerber Life Insurance Company

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**RITA LEPORE**, Great-West Life, London Life, Canada Life

**AMY MARCUS**, Prudential

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**DEBBIE SIMMONS**, The Hartford Financial Group

**MARTIE ZOOR**, Lincoln Financial Group

### *Staff Representative*

**KIMBERLY LANDRY**, LIMRA



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## *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'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 is dedicated to the purpose of assisting all of its members to achieve their competitive potential.

**No smoking during any function.**

### **BADGE COLORS FOR ATTENDEES AT THE 2015 MARKETING & RESEARCH CONFERENCE**

**Blue** — LIMRA member company attendees

**Green** — LIMRA Staff

**Orange** — Nonmember insurance company attendees

**Black** — Guest

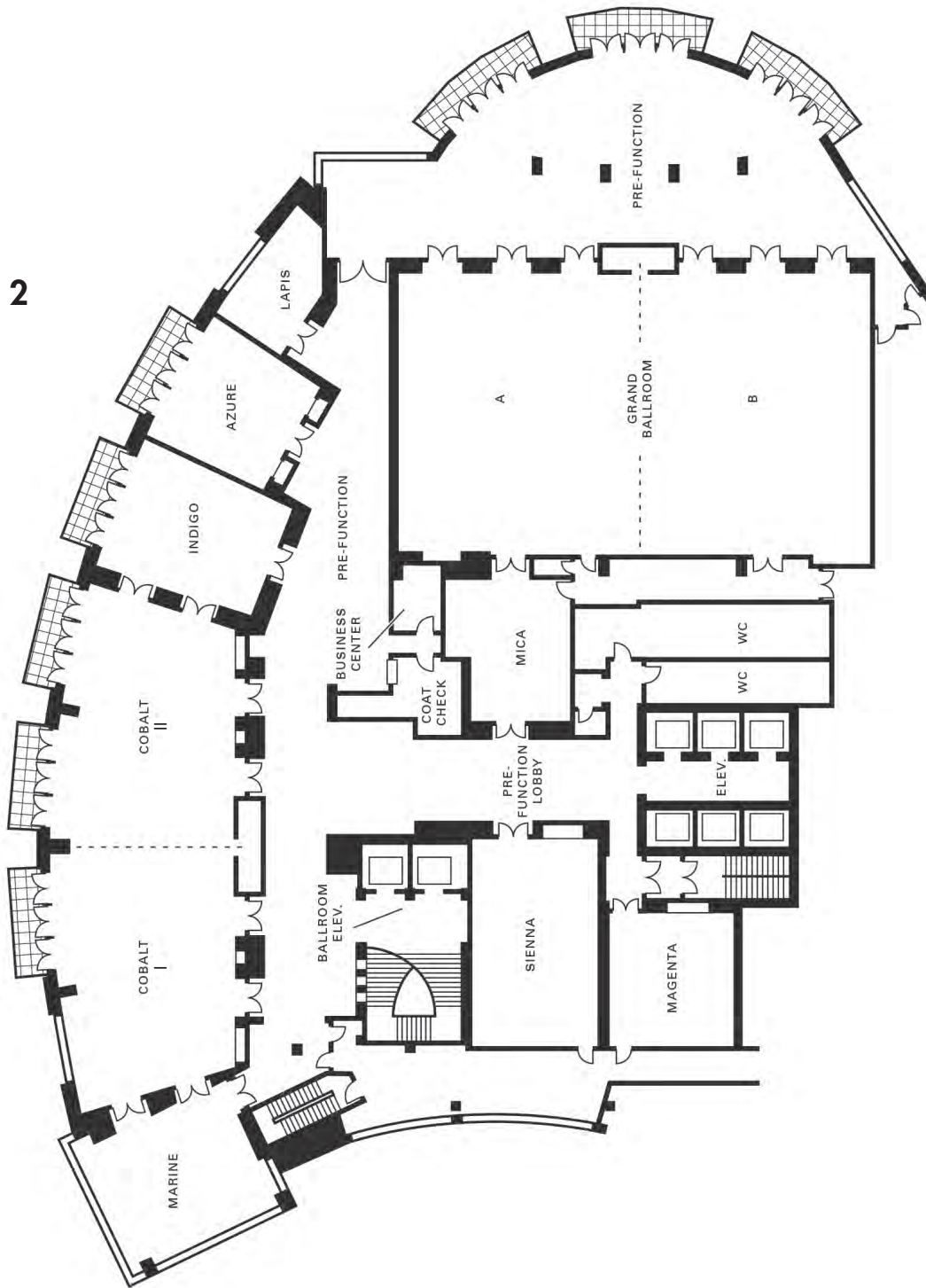


# hotel map



## FOUR SEASONS HOTEL

Floor 2





## 2016 MARKETING & RESEARCH CONFERENCE

June 1–3, 2016  
Disney's Grand Floridian Resort  
Lake Buena Vista, FL



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