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CANADIAN INSURANCE TECHNOLOGY FORUM

P&C Products, Services and Distribution

Tuesday, February 28, 2006
Ontario Bar Association, Toronto

Join your colleagues as leading experts, including suppliers, consultants and practitioners, outline the technology and process strategies that are critical for success in the 2006 marketplace.

Discussion topics will include:

• *How to compete locally as well as internationally* – New research on best practices found in the global insurance market;

• *Provide real, sustainable profitability to your business* – Streamlined underwriting methods and systems;

• *Understand critical marketing, sales and service requirements* – Data-driven customer and business intelligence systems;

• *How to select the right strategies to improve service and reduce costs* – Costs and benefits of technology-enabled distribution technologies, including full service Web portals;

• *Information about gaining competitive advantage from previously siloed environments* – Integrated administration and executive information systems;

• *Realize the benefits of a truly paperless, information-driven environment* – Electronic document and content management;

And much more …

You should attend if you are:

Senior Line-of-Business Manager • IT Executive • Broker • MGA

Involved in P&C Distribution or Policy Management

2006 Canadian Insurance Technology Forum

Dear Colleague:

Senior managers are facing unprecedented challenges in today's hyper-competitive, "lean and mean" environment. The winners are proving to be those who can expertly execute a combination of business, technology, and process strategies. The 2006 Canadian Insurance Technology Forum will help position senior business and technology professionals from P&C insurers and brokers in the winner's camp.

Underwriting profitability is now a consistent objective for many, regardless of swings in market conditions. Leading organizations understand that consistently achieving this objective requires disciplined approaches to marketing, underwriting, and service, combined with appropriate technology - In short: doing the right things, the right way.

The integration of broker and company systems, in real time, is moving into the mainstream. End-to-end transaction processing further enables the "once and done" philosophy, but requires that quoting, rating, underwriting - policy management and customer management systems at both broker and company - be part of a single work flow and procedural environment. Learn how these challenges are being tackled.

Two of Canada's leading insurance information sources - Insurance-Canada.ca and CI-Canadian Insurance Magazine - have teamed up to develop a focused, one-day conference which will provide a business-oriented view of the best-of-breed technology and process approaches which provide powerful, yet flexible tools to support innovative product, service, and distribution strategies.

Forum attendees will have ample opportunity to network with presenters and other attendees, who share common interests and concerns. Leading suppliers will be represented in an exhibit area to provide more details on leading technology offerings.

Sincerely,

Your hosts: **Insurance-Canada.ca** **CI-Canadian Insurance Magazine**

OUR FACULTY

Rick Alcock, Divisional CIO, Personal Insurance, Royal & SunAlliance

Rick manages the Information Systems portfolio for the Personal Insurance Division, and is R&SA's representative on the CSIO Portal Management Committee.

James Barber, Insurance Solutions Manager, Information Builders

James is responsible exclusively for selling and implementing reporting and data management solutions for the insurance marketplace in North America.

Jamie Bisker, Global Insurance Industry Leader, Institute for Business Value, IBM

Jamie focuses on creating thought leadership for the global insurance industry. He researches and describes the future state of the business climate for insurance and how carriers around the world can adapt to technological innovation that can significantly improve their performance.

Kevin Campbell, President, Policy Works

Kevin leads the Policy Works team on a mission to link brokers and insurers electronically with a vision to provide brokers with a single tool to manage all of their commercial lines business.

Patrick Durepos, President, Keal Technology

As President of Keal Technology, Pat works to develop functionalities that improve efficiencies and reduce costs.

Daniel Moore, Managing Principal Consultant, Business Process Services Practice, Xerox Global Services

Daniel is experienced in business process improvement and document management planning, design and implementation. He is responsible for business development, methodology leadership, practice management, and working with clients.

Terry Neilson, President and CEO, Insurance Systems Inc.

Terry leads Insurance Systems Inc. (ISI) in developing Web-enabled solutions for insurance, a strategy which has made ISI a Canadian technology success story.

Christian Playford, Vice President, Consulting Services, Insurance Business Solutions, CGI

Christian Playford is Vice President of Consulting Services for CGI Insurance Business Services (IBS) in Canada.

Greg Purdy, CEO, Applied Systems Canada

As Chief Executive Officer for Applied Systems Canada, Greg is a member of the executive team for Applied Systems, Chicago, and carries responsibilities for Canada, the U.K. and other activities outside the U.S.A.

Brenda Rose, Vice President, Firstbrook Cassie & Anderson Ltd.

Experienced in most aspects of the business, Brenda fulfills her executive responsibilities. She is also a VP of Toronto Insurance Conference, chairing their technology committee.

Richard Shallhorn, CIO & Privacy Officer, HKMB International Insurance Brokers

Following assignments in Group and Personal Lines, Richard manages the Information Systems team and ensures compliance with privacy legislation.

David A. West, Insurance Industry Marketing Manager, SAS Worldwide Marketing

With research and development teams, customers and global analysts, David identifies specific business pains felt by industry executives and provides counsel on how business intelligence from SAS can help most areas of insurance.

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AGENDA

8:00 Registration and Coffee

9:00 Welcome & Opening Remarks
> Patrick Vice, I/T Manager,
> Frank Cowan Company Ltd.

KEYNOTE SPEAKER

Insurance 2020: The Undiscovered Country
> Jamie Bisker, Global Insurance Industry Leader, Institute for Business Value, IBM

What do industry leaders see for the future? Find out the results of a global study designed to analyze the state of the insurance industry over the next 15 years. Perspectives, opinions and projections were collected via surveys, roundtables, and interviews with insurance executives, line-of-business leaders, and analysts from around the world.

Policy Administration Systems are taking centre stage again!
> Christian Playford, Vice President, Consulting Services, Insurance Business Solutions, CGI

Executives who are looking to expand understanding and extend control over results are re-discovering the critical importance of flexible, robust administration systems. Learn what key questions insurers are asking as they prepare to replace or retool these critical systems to support business, both today and in the future.

-----Refreshment break----

New Web Technologies Enabling Enterprise Insurance Applications: A Non-technical View
> Terry Neilson, President & CEO,
> Insurance Systems Inc.

Recent advances in technology have made it possible for Web applications to replace traditional enterprise mainframe or client/server applications, allowing companies to realize cost savings while improving service levels. However, the technical jargon prevents business managers from fully understanding the implications and potential. This session will provide a broad, non-technical overview of the latest Web technologies and what impact they will have on the development of enterprise applications for insurance companies.

Does Underwriting Matter?
> David A. West, Insurance Industry Marketing Manager, SAS Worldwide Marketing

Common wisdom suggests that automated underwriting requires the translation of underwriting rules into computer systems. Yet these rules have rarely, if ever been tested to determine if they are having the right impact on loss performance. Several sophisticated and profitable insurers in Europe and the U.S. have evolved to the point that they employ no underwriters. Is this the way of the future? This provocative presentation will address the fundamental question: Does Underwriting Matter?

12:00 Noon - Networking Lunch

1:15 Forum Resumes

Extending Managed Workflow from Brokerage to Markets and Beyond
> Greg Purdy, CEO, Applied Systems Canada
> Rick Alcock, Divisional CIO, Personal Insurance, Royal & SunAlliance
> Brenda Rose, Vice President, Firstbrook Cassie & Anderson Ltd.
> Richard Shallhorn, CIO & Privacy Officer, HKMB International Insurance Brokers

Broker Management Systems have evolved from separate, discrete functions into fully integrated customer information, policy management, marketing, and accounting systems. The evolution includes: real-time comparative rating and policy issuance, integrated workflow management, billing and premium-financing access, and commercial and specialty line processes. Panel members from the practitioner community will outline the steps they are taking to realize benefits now, and to be positioned for future success.

Measureable Results Through Broker Improvements
> Pat Durepos, President, Keal Technology

Broker automation and Single Entry, Multiple Company Interface (SEMCI) have been mantras for companies and brokers for decades, with only spotty success in implementation. With several solutions available to brokers, it is important to compare the value of these approaches. One major impediment has been the lack of quantifiable results for brokers, insurers, and customers. Keal Technologies will present results of detailed analyses of the measurable results of automation and SEMCI implementation by its customers.

Beyond Portals: Effective eMarketing for Commercial Lines
> Kevin Campbell, President, Policy Works

Insurance carriers are gaining efficiencies with the use of Internet portals for commercial lines, but this can mean separate processes and double entry for brokers. The technology exists to allow for the end-to-end electronic exchange of information between commercial lines brokers and insurers. This presentation will detail the state of the art for electronic marketing of commercial lines policies, resulting in overall cost reduction, market flexibility, and improved service.

-----Refreshment break----

Electronic Content Management: Managing the Mountains of Information
> Daniel Moore, Managing Principal, Business Process Services Practice, Xerox Global Services

Insurers and brokers live with largely paper-based information and processes that have been inadequate to successfully manage their growing businesses. Early imaging and document management projects were plagued with technology challenges, cost overruns, and low return on investment. This session will describe how recent developments in "Electronic Content Management" encompassing imaging, document management, and workflow, can be successfully delivered to accelerate and automate many insurance processes.

Delivering Integrated P&C Information
> James Barber, Insurance Solutions Manager, Information Builders

P&C insurers must provide meaningful information to internal and external audiences, typically from diverse information systems and sources. Leading insurers have transformed reporting from a necessary evil to a strategic tool. Several Canadian P&C insurance companies have addressed their information delivery challenges while solving business problems, accelerating time to business value, reducing costs, and minimizing project risk. Learn about a methodology, including implementation options and project roadmap.

4:30 Forum Conclusions & Close
> Doug Grant, Principal, Insurance-Canada.ca