

2025 LIC ANNUAL CONFERENCE

*Unlocking Potential:
Research-Fueled Decision Making*

Hyatt Regency Clearwater, Florida | February 5-7, 2025



The theme of LIC's 2025 Annual Conference is **Unlocking Potential: Research-Fueled Decision Making**. Data-driven decision-making is paramount in creating company strategy and everyday management of operations. From long-term planning to real-time customer experience decisions, despite being smaller companies with corresponding constraints, a culture of business intelligence and data-centered decision making are vital to responding to market pressures, competing, and long-term success.

During this conference, you will hear from top subject matter experts who will help you understand the importance of a business intelligence culture and how to build it; research design and methodology; the impact and promise of artificial intelligence and "GenAI" on research and data analysis; summaries of the latest research from LIC and LIMRA/LOMA; plus open discussion and networking with leaders from small-to-midsize life insurance companies to share similar challenges and innovative ideas. After attending the LIC Annual Conference, you'll be refreshed, excited, and equipped with new tools to help make 2025 your best year ever. Unlock YOUR potential!

PRELIMINARY AGENDA

Wednesday, February 5, 2025

6:00 p.m. **Opening Reception & Registration**

7:00 p.m. **Dinner On Your Own**

Thursday, February 6, 2025

8:00 a.m. **Networking Breakfast & Registration**

8:30 a.m. **Welcoming Remarks from LIC's Board Chair**
Tony Mravle, President & CEO, KSKJ Life

8:35 a.m. **Remarks from LIMRA**
David Levenson, President & CEO, LIMRA and LOMA

8:45 a.m. **Program Introduction**
Dean Lambert, Executive Director, LIC

8:50 a.m. **Keynote Address**
Understanding Consumer Psychology and Uncovering Hidden Consumer Preferences using Zaltman Metaphoric Elicitation Technique

James Forr, Head of Insights, Olson Zaltman

James Forr is an expert on understanding what makes people tick and how their psychology affects their behavior. In this session, he will introduce the ZMET technique: the philosophy, how it evolved, how insights are derived, and why these insights are so important to understanding what really motivates consumer behavior. In addition to leading ground-breaking in-depth research into perceptions of the funeral industry a decade ago, James has consulted for Fortune 500 companies including Amazon, PepsiCo, Pfizer, P&G, and CVS Health. He also has lectured at universities around the country, including the Wharton School, Georgetown University, and Boston University.

- 9:50 a.m. **Networking Break**
- 10:05 a.m. **Effective Vision and Strategy Development Begins with Internal Data Mining & Analysis**
Jed Jones, Founder, JLytics
The need to understand what is happening in your business is paramount before creating a go-to-market strategy. This, in fact, guides leaders in what external market insights are needed to discuss short- and long-term vision. Jed Jones founded JLytics in 2023 because he saw a need in the marketplace to help CEOs and business owners get themselves in a position to make data-driven decisions. Over 25 years and through his various businesses, Jed has supported hundreds of business clients as a marketer and a data scientist. He has worked for, in and around small businesses, Fortune 100 companies, and as a founder and owner of two advertising agencies.
- 11:20 a.m. **Facilitated Discussion**
Facilitator: Dean Lambert, Executive Director, LIC
Your meeting...your topics! A focus of every LIC meeting is a facilitated discussion featuring your requested topics of opportunities and challenges as leaders of small-to-midsize insurance companies.
- 12:00 p.m. **Networking Luncheon**
- 1:00 p.m. **Artificial Intelligence and Information Systems**
Kartik Sakthivel, Ph.D., VP & CIO and Regional CEO-Asia West, LIMRA and LOMA
A discussion of artificial intelligence, specifically as it relates to information systems and introduction of LIMRA's new AI Governance Group, which draws expertise from 72+ business and technology executives representing 40+ US insurance companies. In addition to his role at LIMRA and LOMA, Kartik is an accomplished thought leader in the field of digital transformation and AI, a TEDx speaker, and the author of three books on leadership and AI, including *Find Your Red Cape* and *DNAI: The AI Management (AIM) Framework*.
- 2:10 p.m. **Break**
- 2:25 p.m. **Insights on Research Planning**
Bryan Hodgens, AIF, CRC, Senior Vice President and Head of Research, LIMRA and LOMA
In his role at LIMRA and LOMA, Bryan develops and executes the research strategy for both the distribution and retirement research programs, focused on providing insights and best practices to address the current and emerging business challenges facing LIMRA members. He will share his insights on effective research planning, including defining what learning is desired, developing scope and methodology, question design, sample selection, data collection, and analysis.
- 3:25 p.m. **Sessions Adjourn for the Day**
- 6:00 p.m. **Networking Reception**
- 6:30 p.m. **LIC Annual Membership Banquet**
LIC's traditional annual banquet is a chance to enjoy fine dining, develop old and new friendships in the industry, and mark the occasion as the LIC leadership is handed to the new incoming board for 2025.

Friday, February 7, 2025

- 8:00 a.m. **Networking Breakfast**
- 8:30 a.m. **Welcome from LIC's Incoming Board Chair**
Joan Cleveland, CLU, ChFC, REBC, President & Chief Executive Officer, SWBC Life Insurance Company
- 8:40 a.m. **Panel Discussion: Q&A with Presenters**
- 9:30 a.m. **Introduction to LIC Research Summaries**
Dean Lambert, Executive Director, LIC
LIC-Equisoft Technology Needs Study, Presented by Equisoft
LIC Final Expense Survey, presented by LIC's Final Expense Survey Task Force
American Fraternal Alliance-LIC CEO Compensation Study, presented by Tony Mravle, KSKJ Life
- 10:35 a.m. **Break**
- 10:45 a.m. **Facilitated Discussion**
Dean Lambert, Executive Director, LIC
Missed topics from Thursday and any new topics.
- 11:45 a.m. **Closing Remarks**
Dean Lambert, Executive Director, LIC
Audrey Wittenburg, ACS, ALMI, Director of Operations, LIC
- 12:00 p.m. **Adjourn**

