

Benefit Advisors Network Educational Conference

SATURDAY, January 25, 2020

Benefit Advisors
NETWORK



PRE-CONFERENCE

- 8:00 am - 10:30 am REGISTRATION & PACKET PICK-UP
- 8:30 am - 3:30 pm Human Capital Management Summit —
Presented by Bobbi Kloss & HCM Committee ([Full Agenda with Details Available During Registration](#))
- 10:00 am - 5:30 pm Pharmacy Certification — Presented by Confidio ([Full Agenda with Details Available During Registration](#))
- 4:00 pm - 5:30 pm New Member & Prospective Member Orientation

SUNDAY, January 26, 2020

PRE-CONFERENCE

- 7:30 am - 2:30 pm REGISTRATION & PACKET PICK-UP
- 8:00 am - 12:00 pm Data Analytics — Health Intelligence Workshop; So What — Now What?
- 10:00 am - 12:00 pm Operations Peer Group — Geared for Individuals Overseeing
Account Managers/Account Executives within the Agency

CONFERENCE BEGINS

GENERAL SESSION

- 1:30 pm - 2:00 pm Conference Kick Off Presented by Las Vegas Members
- 2:00 pm - 2:45 pm **Opening Comments**
- 2:45 pm - 3:00 pm Transition to Regional Breakouts

BREAKOUT SESSIONS

- 3:00 pm - 4:00 pm Regional Breakouts
Northeast — CT, DE, MA, NH, NJ, NY, PA, VT
Southeast — AL, FL, GA, KY, MD, MS, NC, SC, TN, VA
Midwest/Central — AR, CO, IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, OK, SD, TX, WI
West — AK, AZ, CA, CANADA, GUAM, ID, NV, OR, UT, WA
- 4:00 pm - 4:15 pm Transition Break to General Session

GENERAL SESSION

- 4:15 pm - 5:15 pm Key Note Speaker — Richard Fagerlin/Trustology (Details Coming Soon)
- 5:30 pm - 7:00 pm Welcome Reception for All Attendees, Guests & Sponsors

MONDAY, January 27, 2020

- 6:30 am - 8:30 am Buffet Breakfast
- 8:00 am - 12:00 pm REGISTRATION & PACKET PICK-UP
- GENERAL SESSION**
- 8:30 am - 9:30 am HR Technology Update Presented by Benefit Technology Resources: Jamie Hawkins, Josh Hoover, and Corrina Nation
- 9:30 am - 9:45 am Transition to Breakouts
- BREAKOUT SESSIONS**
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- 9:45 am - 10:45 am Account Manager — Considerations for Transitioning Clients from Fully Insured to Self Insured
Personalized Care & Advocacy Presented by Accolade
Marketing — Creating Content for the Most Boring Industry in the World

This timeline and agenda are subject to change.



MONDAY, January 27, 2020 (Continued)

10:45 am - 11:00 am Transition to Breakouts

BREAKOUT SESSIONS

11:00 am - 12:00 pm Account Manager — Compliance STILL Matters — How to Have “The Talk” with Clients and Prospects; Developing a Strong Compliance Strategy within Your Agency
Pharmacy — PBM Alternative Pricing Models. Traditional vs Pass-Through Contracting
Marketing — Digital Marketing Power Panel: Essential Strategies for the Modern Marketer

12:00 pm - 12:45 pm Working Lunch — Account Manager
Open Discussion on What I Wish I Knew When I Started Servicing Accounts

12:00 pm - 12:45 pm Working Lunch — Marketing
Cards with Marketing! Get Ready to Share Your Marketing Best Practices in a Fun Way!

12:00 pm - 1:00 pm Buffet Lunch for All Other Members

12:45 pm - 1:00 pm Transition to General Session

GENERAL SESSION

1:00 pm - 2:00 pm Denise Winston/Money Starts Here — Financial Wellness — Identifying Lost Opportunities, Profits, and Agency Differentiation: Learn more about how large and small employers are engaging in conversations that may put your client relationships, profitability, and market share at risk

2:00 pm - 2:15 pm Transition to Breakouts

BREAKOUT SESSIONS

2:15 pm - 3:15 pm Denise Winston/Money Starts Here — Financial Wellness — Want to increase profits, differentiate your agency, and win/keep more business? Attend this session, identify your strategy, then have the conversation and address what is on your clients' and their employees' plates going into 2020
Marketing — Bridging the Gap Between Marketing, Sales, and Client Services
Data Analytics — Using Data Analytics for Strategic Planning — If You Are Not Talking to Clients Someone Else Is

3:15 pm - 3:30 pm Transition to General Session

GENERAL SESSION

3:30 pm - 5:00 pm Compliance Update — Janet Trautwein/NAHU; Stacy Barrow and Peter Marathas/MBWL; and Danielle Capilla/Alera

5:30 pm - 7:30 pm Welcome Reception for All Attendees, Guests & Sponsors

TUESDAY, January 28, 2020

7:00 am - 9:00 am Buffet Breakfast

BREAKOUT SESSIONS

9:00 am - 10:00 am Owners Only Workshop
HCM/Winning with Wellness — Building a Foundation for People, Business, and Culture; Member Case Studies on Positioning and Executing Physical, Financial, and Social/Emotional Wellness with Clients
Account Manager — Creating Efficiency in Small Group Automation? Hear from other agencies on their strategies and vendors utilized to be efficient in this space
Marketing — Glancing Back at 2019 and Moving Forward into 2020

10:00 am - 10:30 am BREAK for Room Checkout

GENERAL SESSION

10:30 am - 11:30 am Innovative Trends

11:30 am - 12:00 pm Closing Comments

12:00 pm CONFERENCE ADJOURNS



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