IDMA 2013 Annual Meeting & Seminar

April 15–16, 2013 ■ Doubletree Hotel Philadelphia ■ Philadelphia, PA

Program
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<td>7:45 – 4:45</td>
<td>Registration (coffee and tea stations will be available for early morning registrations 7:45-8:45am)</td>
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| 8:45 – 10:15 | Roundtable: Let's Talk About Data Management  
Facilitator: Peter Marotta, Verisk Analytics |
| 10:15 – 10:45| Refreshment Break                                                     |
| 10:45 – 11:30| Keynote Address: Creating a Culture of Innovation and Business Intelligence  
Adel Ebeid, The Office of Technology and Innovation for the City of Philadelphia |
| 11:30 – 12:00| IDMA Annual Meeting (all attendees are welcome to participate)         |
| 12:00 – 1:00 | Lunch (provided)                                                      |
| 1:00 – 2:00  | Track 1: Data Governance  
Data Governance Best Practices for Insurance  
Susan Haney, Amica Mutual; Lisa O'Rourke, Amica Mutual; Sunil Soares, Information Asset, LLC |
| 1:00 – 2:00  | Track 2: Analytics & Competitive Intelligence  
Location Intelligence: The Benefits of Adding the “Where” Factor to Predictive Analytics  
Patrick Hayes, Galigeo |
| 1:00 – 2:00  | Track 3: General Business  
Integrating More Data in Less Time Using Data Virtualization: Insurance Case Studies  
Suresh Chandrasekaran, Denodo Technologies |
| 2:00 – 2:15  | Transition Break                                                      |
| 2:15 – 3:15  | Track 1: Data Governance  
Using Quality Principles to Put Data Governance to Work  
Maria Snow, NCCI Holdings |
| 2:15 – 3:15  | Track 2: Analytics & Competitive Intelligence  
Analytic Insurer – How Big Data and Analytics are Changing Insurance  
Stuart Rose, SAS |
| 2:15 – 3:15  | Track 3: General Business  
Modernizing Information and Data Management Platforms: Lessons from one Carrier’s Journey  
Samir Ahmed, X by 2, Inc.; Cheri Barnhart, Farm Bureau Insurance of Michigan |
| 3:15 – 3:45  | Refreshment Break                                                      |
| 3:45 – 4:45  | Track 1: Data Governance  
Data Governance Once You're Up and Running  
Helena Reilly, Travelers Insurance |
| 3:45 – 4:45  | Track 2: Analytics & Competitive Intelligence  
Making the Quality Assurance Department, an Intricate Part of the Data Warehouse Initiative  
Kathy Blankenship, American National Property and Casualty Insurance Comp |
| 3:45 – 4:45  | Track 3: General Business  
Social Engineering: The Ultimate Threat to Data  
Ara Trembly, Ara Trembly—The Tech Consultant |
| 4:45 – 6:15  | No Scheduled Activities!                                               |
| 6:15 – 9:15  | Reception, Banquet and Entertainment – Casino Night with Prize Drawings! |

**Tuesday, April 16, 2013**

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<td>7:00 – 8:00</td>
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| 8:00 – 9:00  | Panel: Challenges & Successes in Insurance Information Quality  
Anne Marie Smith, Alabama Yankee Systems, (Moderator)  
Paul Ayoub, FCCI Insurance  
Arne Herenstein, Harleysville Insurance  
William Jenkins, Agile Insurance Analytics  
Mardee Brosh, Elevation Technology Advisors  
Mark Breading, SMA: Strategy Meets Action |
| 9:00 – 9:30  | Refreshment Break                                                      |
| 9:30 – 10:30 | Panel: Improving Claims Outcomes with Better Data Quality  
Stephen Applebaum, Aite Group, (Moderator)  
Michael Chochrek, Trillium Software  
Owen Williams, Chief Information Officer - Claims, Chubb |
| 10:30 – 10:50| Transition Break                                                      |
| 10:50 – 11:50| Panel: Leadership in Managing Data and Key Takeaways from this Conference  
Jim Viveralli, Erie Insurance Group (Moderator)  
Nora Fitzgerald, CNA Insurance  
Tom Nowak, AIG  
Bob Ridings, QBE Insurance  
Tracy Spadola, Teradata  
Jane Zawistowski, ISO |
Monday, April 15, 2013

7:45am – 8:45am
Early Registration (Coffee and Tea stations will be available)
(Note: Registration table will be open until 4:45pm)

8:45am – 10:15am
Roundtable: Let’s Talk About Data Management
All registrants are invited to attend this Data Management Roundtable. The IDMA Roundtable format invites commentary and discussion. For those unfamiliar with the IDMA Roundtable process, discussions are quite informal and are geared towards audience interest and participation. Please suggest topics of interest to you when you submit your registration. Please note that topics of discussion are very fluid and can change during the Roundtable, provided they involve data management, are in keeping with IDMA guidelines, and are of interest to participants.

Facilitator: Peter A. Marotta, Enterprise Data Administrator, Verisk Analytics, Inc.

10:15am – 10:45am
Refreshment Break (Exhibit Hall)

10:45am – 11:30am
Keynote Address: Creating a Culture of Innovation and Business Intelligence
Adel Ebeid, the first Chief Innovation Officer for the City of Philadelphia, and former Chief Information and Technology Officer for the State of New Jersey, will describe how to best build a foundation for an extremely agile and smart business that enables innovation, growth, and collaboration. In his address, Mr. Ebeid will also share with the audience some real life stories on how the City of Philadelphia was able to maximize the power of analytics and big data in planning and operating. His experience will be inspirational for attendees who are facing the same obstacles he faced!

Keynote Speaker: Adel Ebeid, Chief Innovation Officer, The Office of Technology and Innovation for the City of Philadelphia

11:30am – 12:00pm
IDMA Annual Meeting (all attendees are welcome to participate)
- IDMA outgoing President, Jim Viveralli, will give his State of the Association Address.
- IDMA Vice President of Education, Jane Zawistowski, will deliver a brief report on the IDMA certification curriculum.
- IDMA 2013 Graduating Class Conferment will take place – New IDMA graduates (AIDMs and CIDMs) will receive their diplomas.
- IDMA will recognize a few individuals who have made and continue to make significant contributions to the development of the insurance data management profession and who have shown exemplary leadership in promoting IDMA and its mission to the industry. Awards will be handed out to those individuals.
- An annual vote to elect new IDMA Board of Directors and operating committees’ members will take place.

12:00pm – 1:00pm
Lunch (provided)
1:00pm – 2:00pm: Breakout Sessions #1

**Track 1: Data Governance**

**Data Governance Best Practices for Insurance**

Big data governance is part of a broader information governance program that formulates policy to optimize and maintain the privacy of big data by aligning the objectives of multiple functions. Organizations need to govern big data just as they would other types of information such as master data and reference data. Organizations need to apply the traditional principles of information governance (metadata, data quality, security and privacy, and information lifecycle management) to big data.

This session will discuss the following:

- Sample data governance charter for insurance
- Sample data governance organization for insurance
- Sample RACI matrix for insurance
- Sample data stewardship roles for insurance
- Sample data quality metrics for insurance
- Key issues in insurance for big data governance (e.g. telematics, social media, unstructured content)
- Sample data policies for insurance.

*Susan Haney, Assistant Vice President – Information Systems, Amica Mutual Insurance Company*

*Lisa O’Rourke, Data Management Section Manager, Amica Mutual Insurance Company*

*Sunil Soares, Founder & Managing Partner, Information Asset, LLC*

**Track 2: Analytics & Competitive Intelligence**

**Location Intelligence: The Benefits of Adding the “Where” Factor to Predictive Analytics**

Location Intelligence brings the "Where" factor to performance analysis and enables a deeper analysis of business information; all designed to assist companies in reaching conclusions and making the next, best business decision. By harnessing information already within Business Intelligence (BI), Customer Relationship Management (CRM), Supply Chain Management (SCM), and other enterprise applications, location intelligence enables insurance companies to integrate location dimensions with performance management, reporting, predictive analytics and campaign management solutions to increase sales and optimize marketing operations. Location Intelligence assists companies in making complex location-dependent business decisions by representing and displaying business intelligence data on maps to identify hidden trends, customer relationships and behaviors, as well as enable a deeper marketing analysis.

This presentation will discuss how Location Intelligence empowers organizations to extend BI, CRM and standard database capabilities with visual geographical dimensions that enhances data visualization, reporting and predictive analytics.

*Patrick Hayes, Managing Director, Galigeo*

**Track 3: General Business**

**Integrating More Data in Less Time Using Data Virtualization: Insurance Case Studies**

The insurance industry faces major data challenges... big, complex, real-time data ... growing exponentially, and the business wants integrated data faster, and more flexibly to feed analytics and new applications. This session will discuss Data Virtualization which is now widely accepted as complementing batch-oriented, traditional data integration to bring speed and flexibility to integrate disparate data and provide unified data services. The business value of data virtualization is illustrated using 3-4 insurance case studies for big data analytics, unified underwriting desktops, data warehouse and MDM prototyping, and unstructured data integration. We conclude with best practices for adoption.

*Suresh Chandrasekaran, Senior Vice President, Denodo Technologies*

2:00pm – 2:15pm

**Transition Break**
2:15pm – 3:15pm: Breakout Sessions #2

**Track 1: Data Governance**

**Using Quality Principles to Put Data Governance to Work**

National Council on Compensation Insurance (NCCI) implemented a unique and practical data governance practice to manage points of access, collection, usage, storage, and transfer of data. It is a low-budget and practical application of data governance that can be implemented with minimal technology that puts the onus on detailed ownership plans. It is a process that can be implemented with a small number of functions and then expand; so it is less challenging to gain initial buy-in from Senior Management. NCCI developed and implemented this plan using quality principles – a general approach NCCI has developed to implement process improvements.

This presentation will cover:
- An original data governance practice that addresses access, collection, usage, storage, and transfer of data.
- A low-budget practical application of data governance that can be implemented with minimal technology that puts the onus on detailed ownership plans.
- An approach that gained senior management support and approval due to minimal technology impacts and minimal ownership changes across company divisions.
- An approach to implementing data governance using quality principles.
- A controlled data governance program that has been in place for four years - benefitting from learning and continuous improvement.

*Maria Snow, Data Operations Executive, NCCI*

**Track 2: Analytics & Competitive Intelligence**

**Analytic Insurer – How Big Data and Analytics are Changing Insurance**

Insurance organizations are already inundated with data, and the volumes are growing rapidly due to telematics, social media, and data from other unstructured sources. Today, big data technologies are taking the business world by storm, introducing new approaches to rapidly analyzing large amounts of data from many sources. Big data is often defined as the volume, variety, and velocity of data that exceeds an organization’s ability to manage and analyze it in a timely fashion. But the true value of big data is realized when it can be harvested for fast, fact-based decisions that lead to great business results.

This session will discuss:
- How insurers are using analytics to optimize operations in distribution, claims and risk management.
- What insights and competitive can insurers gain from big data and analytics.
- How to overcome challenges to analytics adoption.

*Stuart Rose, Global Insurance Marketing Director, SAS*

**Track 3: General Business**

**Modernizing Information and Data Management Platforms: Lessons from one Carrier’s Journey**

In order to participate in the brave new world of advanced analytics and predictive modeling, many insurance carriers find themselves having to deal with decades full of information neglect and even apathy. As insurers take on the arduous task of moving from a legacy to a modernized information architecture and platform, they face many challenges. This presentation will focus on one carrier’s journey from legacy to the modern, highlighting necessary and required foundational steps. Attendees will walk away with practical steps they can take to move their organizations forward in modernizing their information and data management platforms.

*Samir Ahmed, Consultant and Software Architect, X by 2, Inc.; Cheri Barnhart, Business Solutions Strategist, Farm Bureau Insurance of Michigan*

3:15pm – 3:45pm

Refreshment Break (Exhibit Hall)
3:45pm – 4:45pm:  Breakout Sessions #3

**Track 1: Data Governance**

**Data Governance Once You’re Up and Running**

So your organization has data governance and a metadata repository in place: what next? What are the challenges as the process matures?

This presentation will describe how the processes of data governance and metadata management work at a company with five years’ experience. It will cover how both processes have evolved, what problems have been solved, and what challenges remain and/or have surfaced over time. It will also cover the governance building blocks, including:

- Review board and data stewardship
- Creating metadata: Naming and metadata types
- Standards
- Metadata repository
- Skills required for data governance professionals

*Helena Reilly, Manager, Claims Business Intelligence & Analytics – Data Management, Travelers Insurance*

**Track 2: Analytics & Competitive Intelligence**

**Making the Quality Assurance Department, an Intricate Part of the Data Warehouse Initiative**

When data quality is to be assessed there are human and technology factors to be considered. While we will wish to educate the audience on new tools to assess data quality, the value of engaging the business group in achieving breakthrough utilization rates is invaluable. We will explain a methodology to engage business and utilize the latest tools in data quality to do so. The strategy adopted at American National Property and Casualty Insurance Company (ANPAC) allowed focused attention to data patterns with the greatest interest to business and a strategic process of evaluating the data warehouse initiative from a business viewpoint.

Educational Objectives for this session include:

- Familiarize the audience with some latest tools which can be adopted to ensure data quality.
- Provide a strategic approach to quality assurance from data quality initiatives.
- Provide a framework to using the latest tools within quality assurance to guide the quality and relevance of data and maximize business utilization of subsequent reports.

*Kathy Blankenship, Manager – Quality Assurance, American National Property and Casualty Insurance Company (ANPAC)*

**Track 3: General Business**

**Social Engineering: The Ultimate Threat to Data**

Much has been said or written about data security and its critical importance in the insurance industry, but these articles and speeches have centered upon specific technologies and defenses. This isn’t the whole story, however. There is a human factor that involves everyone from the CEO to the mailroom clerk to the pizza delivery guy—in short, anyone who has online or physical access to your facilities. Anyone may be victimized by industrial spies, dilettante hackers, or flat-out thieves who count on the gullibility of the legitimate user in order to uncover useful information via social engineering. This session will examine the growing phenomenon of social engineering to gain unauthorized access, including real-life illustrations of sneaky tactics used. Data security consultant Ara Trembly will offer advice on how to counter social engineering ploys and educate employees about this very real danger.

Educational Objectives for this session include:

- Raise awareness of this insidious threat to data security and integrity.
- Educate audience on the methods used by criminals and possible consequences of social engineering attacks.
- Offer advice and strategies to counter these attacks.

*Ara Trembly, Ara Trembly—The Tech Consultant*
4:45pm – 6:15pm
No scheduled activities!

6:15pm – 9:15pm
Reception, Banquet and Entertainment – Casino Night with Prize Drawings!

After the first day sessions conclude, we are going to transform the exhibit hall and the main room into a Vegas Style Casino, with food and beverage stations. You get the chance to network with your colleagues and challenge them to various games of chance, including Black Jack, Roulette, Craps, Texas Hold-em, or Wheel of Fortune. For the light-hearted, we will have slot machines and Jazz music!

You do not want to miss Casino Night! We will be giving away valuable prizes at the end of the night. The more playing chips you have the more raffle tickets you get!

Program continued on the next page!
Tuesday, April 16, 2013

7:00am – 8:00am
Continental Breakfast (Exhibit Hall)

8:00am – 9:00am
Panel: Challenges & Successes in Insurance Information Quality
Data and information quality challenges abound in every organization in every industry, however, few industries rely more on data and information than the insurance industry. Over the years, this field has seen a myriad of issues and problems with data management and the quality of data and information from sources both internal and external. Additionally, the insurance industry has been the focus of several successful efforts at data and information quality improvement that should be examined by other industries for valuable lessons.

This panel, comprised of CIOs from major insurance companies and researchers in insurance analytics, will discuss historical challenges to data and information quality within the industry, offer some observations on the causes of the problems and highlight some actual success stories from their organizations.

Topics will include, but will not be limited to:
- Overview of challenges faced by each organization in data quality.
- Examination of research performed to assess data quality in the insurance industry.
- Opportunities for improving data quality in the insurance industry.

Questions and discussions will be solicited from the audience for what is expected to be a very interesting and informative session for all those interested in data and information quality improvement.

Anne Marie Smith, PhD., Principal Consultant, Alabama Yankee Systems (Moderator)
Paul Ayoub, Chief Information Officer, FCCI Insurance
Arne Herenstein, Chief Information Officer, Harleysville Insurance
William Jenkins, Chief Executive Officer, Agile Insurance Analytics, former Penn National CIO
Mardee Brosh, President and Managing Principal, Elevation Technology Advisors
Mark Breading, Partner, SMA: Strategy Meets Action

9:00am – 9:30am
Refreshment Break (Exhibit Hall)

9:30am – 10:30am
Panel: Improving Claims Outcomes with Better Data Quality
This session is focused on the increasing importance of high organizational data quality and the many ways that impacts claims outcomes. The panel will consist of three subject matter experts: a P&C insurance industry research analyst, a vendor specializing in insurance data quality solutions and a carrier who can discuss the value, benefits and challenges, relative to Claims outcomes, of implementing a data quality improvement program.

Discussion will include:
- Macro factors impacting the industry
- Specific impacts of bad data quality on claims results, staff and operations
- Continuing growth in questionable claims
- Solutions to improve and monitor data quality
- Results

Stephen Applebaum, Senior Analyst – P&C Insurance, Aite Group (Moderator)
Michael Chochrek, Insurance Solutions Principal Consultant, Trillium Software
Owen Williams, Chief Information Officer - Claims, Chubb

10:30am – 10:50am
Transition Break
10:50am – 11:50pm (Capstone Session)
Panel: Leadership in Managing Data and Key Takeaways from this Conference

Data does not manage itself. It takes humans, trained in the art and science of managing data, to lead efforts within their company by ensuring systems conform to data management standards and best practices. Several influences in insurance data management are begging for order among the chaos. Just think about a few topics that have made headlines lately, such as: telematics, federal insurance oversight, Solvency II, IFRS, Big Data, mobile devices, cloud computing, insurance scoring and driverless cars. Any one of these can have a big impact on how we manage data for insurance.

Our panelists are all seasoned leaders in insurance data management and members of the IDMA Board of Directors. They will take turns addressing how leadership and education in insurance data management can make companies more profitable. The panel will also discuss some key takeaways from this conference.

Jim Viveralli, IT Architect – Information Management & Reporting, Erie Insurance Group (Moderator)
Nora Fitzgerald, Vice President, CNA Insurance
Tom Nowak, Senior Vice President, AIG
Bob Ridings, Vice President, QBE Insurance
Tracy Spadola, Practice Lead – Industry Consulting, Teradata
Jane Zawistowski, Manager, ISO

See you in Philadelphia, the “City of Brotherly Love”!