CLAIMS EXPERIENCE MANAGEMENT 2014

Driving Service Excellence Through Efficient, Customer-centric Claims Processes

Main Conference: 27 & 28 May 2014 • Workshops: 26 - 29 May 2014

Venue: Novotel Sydney Central Hotel, Sydney, NSW

Benchmark against these insurance industry leaders:

♫ Linda Broady
Head of Customer Focus, Allianz

♫ Richard Poole
Head of Australian Super Account, TAL

♫ Raimundo Gomes
Manager Information & Analysis, BUPA

♫ Mohinder Kumar
National Manager, Technical, Professional & Industry Claims, Suncorp Metway Limited

Maximise your learning experience with these 4 interactive workshops:

♫ WORKSHOP A:
26 May 2014 16.00pm-19.00pm
Designing a Customer-Centric Experience with Intelligence: How to Optimise the Claims Experience

♫ WORKSHOP B:
27 May 2014 17.00pm -20.00pm
Managing Changes to Claims Workflow Systems

♫ WORKSHOP C:
28 May 2014 17.00pm - 20.00pm
Pragmatic Solutions to Technical Skill Shortages and Staff Retention

♫ WORKSHOP D:
29 May 2014 08.30am-11.30am
Operational Strategies for an Efficient and Seamless Claims Process

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insuranceNEWS.com.au

Customer Management IQ

IQPC
Dear Claims Professional,

The amount of organisations offering insurance products has increased significantly over the last 12 months. In an industry where price can immediately be matched by competitors and products can quickly be tailored to meet customer demand, it is becoming essential to reduce costs, minimise insurance fraud and stand out from competitors by improving operational efficiency.

Providing a seamless claims processing experience will safeguard customer retention and improve competitiveness in an intensely tough market. Implementing new systems and processes will assist in driving down costs but ultimately, providing a fast and efficient claims experience service will ensure a much stronger market share.

If the claims experience provided by an organisation is dissatisfactory, organisations will make themselves vulnerable to significant risks. Carriers that fail to respond, risk more than just customer retention. They are likely to incur costs associated with an increase in customer complaints, complex problem resolution and damage to the company’s brand and reputation.

Claims Experience Management 2014 will unite all stakeholders involved in the claims processing and customer service to share knowledge, new ideas and hear best practice case studies to transform the claims function, complex problem resolution and damage to the company’s brand and reputation.

The key challenges addressed at this year’s event:
- Effectively interpreting customer analytics to drive profitability
- Combatting the lack of adequately skilled and experienced staff
- Successfully implementing the right solution, at the right time
- Embedding a Culture of High Performance
- And many more...

Join your peers this May and discover the best means of providing a winning claims experience and staying in the insurance race.

Secure your place today – call 02 9229 1000 or email registration@iqpc.com.au

I look forward to meeting you at the event.

Clare Mansbridge
Conference Manager
IQPC Australia

Your Expert Speaker Faculty Led By:

- Linda Broady
  Head of Customer Focus
  Allianz
- Richard Poole
  Head of Australian Super Account
  TAL
- Raimundo Gomes
  Manager Information & Analysis
  BUPA
- Mohinder Kumar
  National Manager, Technical, Professional & Industry Claims
  Suncorp Metway Limited
- Kathryn Wood
  Head of Short Tail Claims
  OBE Australia
- Adam Squire
  Head of Claims
  OAMPS
- Bishop Grbic
  Independent Consultant
  Australian Unity
- Greg Wharfe
  Policy Advisor
  Insurance Council of Australia
- Bruce Crossett
  Executive Head of Claims
  Transport Accident Commission
- Alan Hasted
  Claims Manager
  National Transport Insurance
- Vedrana Dekich
  National Claims Manager
  Willis Group
- Deborah Chong
  Client Service Director, Insolvency & Reconstruction
  Willis Group
- Leonie Hawkes
  National Claims Manager
  Beazley
- Kay Jackson
  Managing Director
  Simplex
- Shamus Butler
  Claims Officer
  Simplex
- Mark Peters
  Claims Manager
  Chubb Insurance
- Brad Nicholls
  Managing Director
  ICPS
- Mitchell Parish
  Operations Manager, Disaster Coordinator
  ICPS
- Nathan Taylor
  Director - Dragon Speech Recognition APAC
  Nuance Communications

About Our Sponsors

At Nuance, we’re the people who make voice work. We design and deliver intuitive technologies that help people live and work more intelligently. We provide the tools to inform, to connect, and to empower people to be more productive and creative. We give people more than just control over their communications. We give them command of their lives. From speech technologies that help companies offer superior customer service experiences to imaging technologies that convert physical documents into searchable digital files, our priority is creating solutions that put people in command.

ICPS Australia provides specialised services in design, construction, project management and investigative services, predominantly to the insurance industry. ICPS, established in 2003, is led by CEO Brad Nichols, who has more than 30 years’ experience in the engineering, construction and development industries. ICPS Australia gives the insurance industry a holistic service by investigating, repairing and recovering catastrophically damaged property and assisting on smaller claims as well. ICPS can accelerate the recovery process for insurers and their clients.

As a preferred building service provider for major insurers, Johns Lyng Group expertly delivers on your customer promises every day across Australia. We recognise that customer experience determines whether your customer renewes their policy or not - This is why our focus for 60 years has always been people. Each member of the Johns Lyng Group team shares the same insatiable drive, and dedication to honouring commitments to ensure an exemplary customer experience every time.
**Conference Day 1**

*27 May 2014*

<table>
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<tr>
<th>Time</th>
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<tr>
<td>8.20</td>
<td>Registration and Welcome Coffee</td>
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<tr>
<td>8.50</td>
<td>Opening Remarks from the Chairman</td>
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|       | **Greg Wharf**  
|       | Policy Advisor, Insurance Council of Australia                                             |
| 9.00  | **Aligning the Needs of the Customer with Business Objectives: Analysing Trends for Business Transformation**  
|       | ◆ Differentiating yourself from competitors through a progressive customer experience journey  
|       | ◆ Planning and delivering customer centric claims                                          |
|       | ◆ Building competitive advantage with procedural fairness and accuracy in claims decisions |
|       | **Mohinder Kumar**  
|       | National Manager, Technical Professional and Industry Claims, Suncorp Metway Limited         |
| 9.50  | **Utilising Customer Analytics to Determine the Right Approach for New Systems and Process Implementation**  
|       | ◆ Simplifying the claims process by streamlining internal processes, utilising predictive data and partnering with key external stakeholders  
|       | ◆ How the Transport Accident Commission have successfully implemented a new decision support tool to predict the probability of risk and appropriateness for claim acceptance  
|       | ◆ Effectively meeting customer requirements via an extensive process of consultation with claims management stakeholders  
|       | ◆ Exploiting Valuable lessons learned from implementation of the First Service Model for future improvement |
|       | **Bruce Crossett**  
|       | Executive Head of Claims, Transport Accident Commission                                     |
| 10.30 | **Morning Refreshments and Networking Break**                                             |
| 11.00 | **Building the Business Case for Customer Analytics: Adopting a Customer Centric Claims Experience**  
|       | ◆ Enabling profitable growth whilst improving customer advocacy  
|       | ◆ Identifying the most effective format of collating customer feedback in real time based on channel and touch point performance  
|       | ◆ Deciding on metrics and scores to use and measure the feedback  
|       | ◆ Designing an effective analytics approach to proactively meet customer needs and gain the competitive advantage |
|       | **Kay Jackson**  
|       | Managing Director, Simplex                                                                 |
| 11.40 | **Developing Key Performance Indicators to Measure and Track Business Improvements**       |
|       | ◆ Setting clear KPIs, deliverables and SLAs to measure staff against and identify urgent areas for improvement  
|       | ◆ Identifying and reducing costs via strategic sourcing  
|       | ◆ Establishing a robust framework and aligned congruence model                             |
|       | **Bishop Grbic**  
|       | Independent Consultant, Australian Unity                                                   |
| 12.20 | **Optimising the Claims Process through Speech Recognition Technology**                    |
|       | ◆ Speech Recognition has become a mainstream technology, not just with consumer application but also within the Legal, Finance and Medical sector.  
| 12.50 | **Lunch and Networking Break**                                                             |
| 13.50 | **Identifying Operational Performance Frameworks to Measure the Effectiveness of the Claims Process**  
|       | ◆ Implementing innovative claims management strategies  
|       | ◆ Determining appropriate benchmarks to measure the performance of claims departments  
|       | ◆ Assessing current systems in order to develop desirable performance outcomes  
|       | ◆ Conducting strategic reviews of your frameworks in order to make appropriate changes    |
|       | **Kathryn Wood**  
|       | Head of Short Tail Claims, QBE Australia                                                   |
| 14.30 | **Aligning Systems, Products and Customers: Streaming the Claims Process**                  |
|       | ◆ Driving customer experience by focusing on effective leadership  
|       | ◆ Can win-win scenarios exist in a challenging claims environment?  
|       | ◆ Avoiding a sub-standard claims experience from the beginning by selecting effective products  
|       | ◆ How much value can we add for the customer by bringing product design back into the equation?  
|       | ◆ Outlining effective customer experience frameworks and insight driven initiatives        |
|       | **Richard Poole**  
|       | Head of Australian Super Account, TAL                                                       |
| 15.10 | **Afternoon Refreshments and Networking Break**                                            |
| 15.40 | **Driving Innovation in Customer Experience and Successfully Implementing Change**         |
|       | ◆ Driving innovation whilst navigating a complex Insurance IT environment  
|       | ◆ Understanding why interoperability is of critical importance in resolving efficiency issues  
|       | ◆ Identifying issues related to integrating disparate systems within your business operations  
|       | ◆ Leveraging common platform services to give your organisation more agility with the business processes that differentiate you from competitors |
| 16.10 | **Maintaining Strong Profit Margins with Robust Fraud Detection Systems**                  |
|       | ◆ Eliminating claims wastage and cost inefficiencies  
|       | ◆ Determining the extent of your risk exposure  
|       | ◆ Developing a strategic claims leakage and fraud prevention plan  
|       | ◆ Exploring the current tools available to assist your organisation in controlling and combating fraud |
|       | **Greg Wharf**  
|       | Policy Advisor, Insurance Council of Australia                                             |
| 16.50 | **Close of Conference Day 1**                                                              |
| 17.00 | **Workshop B: Managing Changes to Claims Workflow Systems**                                |

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# THINKTANK DISCUSSION

## CASE STUDY

### 8.50

**Opening Remarks from the Chairman**

Mark Peters  
Claims Manager, Chubb Insurance

### 9.00

**Proactive and not Reactive: Anticipating Human Errors before they Occur and Mitigating Risk**

- How to determine the level of your risk exposure
- Developing a claims leakage strategic business plan
- Determining how to be proactive and not reactive
- Assessing effectiveness of current strategies

Raimundo Gomes  
Manager Information & Analysis, BUPA

### 9.50

**How can we Implement an Effective Rapid Response System During High Volume Crisis Periods?**

- Evaluating outsourcing options to maintain workflow during times of crisis
- Staying abreast of claims processing in times of crisis by improving response times
- Stream-lining the claim set-up to allow greater focus on adjudicating claims
- Maintaining a high level of customer service by providing timely and adequate support to policy holders

Mohinder Kumar  
National Manager, Technical Professional and Industry Claims, Suncorp Metway Limited

### 10.30

**Spotlight Presentation Proudly Hosted by ICPS**

### 11.00

**Morning Refreshments and Networking Break**

### 11.40

**Equipping Staff with the Tools to Manage Systems and Process Transformation**

- Giving staff the right tools to deliver the right information at the right time across the customer touch points
- Promoting customer centricity whilst managing organisational change
- Determining clear KPIs, deliverables and SLAs to measure staff against and identify improvement areas

Alan Hasted  
General Manager - Claims Operations, National Transport Insurance

### 12.20

**Keep it within the Company: Pros and Cons of Outsourcing Services**

- Optimising claims processing with the right mix of Insourcing and Outsourcing
- When and how should business process outsourcing be used for claims management?
- Leveraging both internal competences of the claims process to those with expertise
- Which processes are best kept in-house?

Adam Squire  
Head of Claims, QAMPS

### 13.00

**Lunch and Networking Break**

### 14.00

**Achieving Growth through Recruitment and Investment in the Right Talent**

- Claims management partakers in insurance and their interconnection
- The role of claims personnel employed by broking firms and relationship with other stakeholders
- Recruiting the best people in order to increase profit
- Retaining your key resource through extending and up skilling current employees
- Rewarding and retaining specialist staff

Vedrana Dekich  
National Claims Manager, Willis Group

### 14.40

**Embedding a Culture of High Performance: Using Voice of Customer to Reduce Customer Effort and Optimise Service Quality and Consistency**

- Fostering and achieving staff accountability and ownership of the customer experience
- Improving current training methods to better equip staff with customer oriented skills and tools
- Leveraging VOC insights to reduce customer effort and streamline internal processes to meet customer needs

Linda Broady  
Head of Customer Focus, Allianz

### 15.20

**Overcoming Challenges Associated with Shortages of Skills and Resources**

- Driving productivity, reducing cost and optimising your organisation’s commercial position in a time of crisis
- Developing pragmatic means of coping with a severe lack of resources
- Determining appropriate areas for outsourcing
- Maintaining a high level of customer service by providing timely and sufficient support during times of pressure on resources

Facilitator: Greg Wharf  
Policy Advisor, Insurance Council of Australia

### 16.30

**Gaining Employee Buy-in: Accelerate the Claims Process and Increase Business Agility**

- Delivering through a quality assurance framework
- Ensuring and maintaining quality and risk management whilst delivering on customer expectations
- Gaining employee buy-in from the beginning for claims excellence and managing resistance to change

Adam Squire  
Head of Claims, QAMPS

### 17.10

**Close of Conference Day 2**

### 17.30

**Workshop C: Pragmatic Solutions to Technical Skill Shortages and Staff Retention**

**Panelists will include:**

- Kathryn Wood  
  Head of Short Tail Claims, QBE Australia
- Adam Squire  
  Head of Claims, QAMPS
- Bishop Grbic  
  Independent Consultant, Australian Unity
- Vedrana Dekich  
  National Claims Manager, Willis Group
- Linda Broady  
  Head of Customer Focus, Allianz
- Greg Wharf  
  Policy Advisor, Insurance Council of Australia
- Adam Squire  
  Head of Claims, QAMPS
- Workshop C: Pragmatic Solutions to Technical Skill Shortages and Staff Retention
**Workshop A:** 26 May 2014 16.00PM - 19.00PM
**Designing an Customer-Centric Experience With Intelligence: How to Optimise the Claims Experience**

**Workshop Description:**
Most companies are well aware of the strategies they need to put in place to automate and accelerate the claims process. An area that many within the industry are not quite as confident at navigating is how to effectively utilise customer feedback. It has become increasingly critical, with the extremely competitive current market conditions to understand the changing needs and trends of customers in order to meet these needs proactively and efficiently. It is also crucial to design and implement a competency framework in order to ensure consistency of service and that key deliverables are being achieved and improved upon.

During this workshop participants will discover the most practical means of:

**Workshop Outline:**
- Why you need to identify the most effective format of collating customer feedback after a claim and how to utilise this feedback
- Understanding the critical importance of staff training
- Using internal risk management within your own business
- Successfully retaining customers after a poor claims experience
- Why it is in everyone’s best interest to be pro-active on customer complaints
- Using critical or poor feedback from clients to your advantage
- Using good claims data and statistics in Marketing

About Your Facilitator:
Kay Jackson, Managing Director, Simplex

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**Workshop B:** 27 May 2014 17.00PM-20.00PM
**Managing Changes to Claims Workflow Systems**

**Workshop Description:**
Successfully leading your organisation when implementing new systems and technology in your claims operations can be extremely challenging and a high risk time in terms of maintaining a positive customer experience. Having an effective engagement strategy whilst communicating clear deliverables and providing on-going needed support to all employees is the best method of ensuring buy-in from your team during a time of change. Gaining genuine buy-in from your people is essential to the success of any new process or system.

This workshop will arm participants with the tools to lead change, maintain Service Level Agreements and smoothly transition to the most time and cost efficient processing strategies

**Workshop Outline:**
- Delivering complex, enterprise wide transformation and change programs whilst driving improved and sustainable customer experiences
- Understanding the need to adapt to changing business and market demands
- Leading people through cultural and business transformations
- Creating and embedding a real culture of customer centricity and a place where people want to work: a strategic approach to operations and transformation

About Your Facilitator:
Shamus Butler, Claims Officer, Simplex

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**Workshop C:** 28 May 2014 17.30PM-20.00PM
**Pragmatic Solutions to Technical Skill Shortages and Staff Retention**

**Workshop Description:**
One of the greatest challenges currently being faced by the industry is a chronic lack of adequately skilled and experienced staff. During times of crisis and a high volume of claims, a skill shortage in your organisation can have severe implications. Inefficient processing times will cause not only customer dissatisfaction and a poor claims experience, but also an associated increase in costs and damage to a company’s brand and reputation. However, robust processes are just the groundwork for a quality customer experience. Lateral thinking, understanding and advocating are vital attributes of a best practice approach.

During this workshop participants will focus on practical means of overcoming the challenges associated with shortages of technical skills and resources. How heavily should you be investing in recruiting the right staff? Can you afford not to? This workshop will provide an interactive chance to brainstorm the most pragmatic solutions and ideas to one of the grave challenges currently being faced by the industry.

**Workshop Outline:**
- Discussing the balance between efficient and effective processes and staff capacity to think outside the box
- What does the ‘ideal claims handler’ look like?
- Considering investment as a means of retaining your most important resource: staff
- Up Skilling, Training and Development of Existing Staff
- Case studies

About Your Facilitators:
Vedrana Dekich, National Manager, Claims Advocacy, Willis Group
Deborah Chong, Client Service Director, Insolvency & Reconstruction, Willis Group

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**Workshop D:** 29 May 2014 08.30AM – 11.30AM
**Operational Strategies for an Efficient and Seamless Claims Process**

**Workshop Description:**
Selecting the ideal and most innovative new automation systems to achieve optimal efficiency for your organisation is a necessary first step to accelerating the claims process. Successfully implementing a new system can present a minefield of potential disruption and interoperability issues in a complex insurance IT environment. During this workshop we will brainstorm and discuss the most effective ways of seamlessly transitioning streamlining the claims process and how best to implement new systems with the least amount of disruption to your operations. This interactive workshop will offer an operations perspective on managing changes to systems.

**Workshop Outline:**
- Avoid being left behind in the race to successfully implement new technologies and systems
- Discover how to avoid issues related to integrating disparate systems within your business operations
- Strategies for pinpointing potential risk areas for disruption

About Your Facilitator:
Leonie Hawkes, National Claims Manager, BEAZLEY

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<td>$5449 + GST = $5993.90</td>
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