

# SPUG Meeting 2011

*“Accelerate Your Competitive Advantage with SurePower Innovation®”*

September 12-14, 2011

The Fairmont San Jose

170 South Market St., San Jose, CA 95113 (408) 998-1900

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- Increase Your Professional Network
- Collaborate with Your Peers
- Bring Ideas Back that Help You in Your Job
- Influence SurePower’s Development

## Monday, September 12, 2011

<p>Shuttle for Golf leaves from Fairmont at 8:30 am for 10 am tee time</p>	<p><b>Choice of Social Activity:</b> <i>Networking with peers &amp; ISCS partners during some informal fun</i></p>
<p>Shuttle for ISCS Headquarters tour leaves from Fairmont at 9:30 am, arrives back at Fairmont by 11:00 am</p>	<p><b>Golf</b> @ The Ranch Golf Club, 4601 Hill Top View Lane, San Jose, CA. This Casey O’Callaghan and Wade Cable designed course, features bent grass greens and cool season grass fairways. The spectacular locale adds to the golf experience with dramatic elevation changes, rolling hills, lush oak-filled canyons, lakes &amp; creeks, and majestic views. <b>We will play a scramble format so ALL golfers of ANY skill level will enjoy the outing!</b></p> <p><b>ISCS Headquarters Brief Tour</b> @ 100 Great Oaks Blvd, San Jose, CA. Shuttle leaves Fairmont at 9:30 am and returns by 11:00 am in time for those who want to enjoy the wine bar luncheon. Note you cannot do the ISCS tour and golf. You can do the tour and be back in time for the wine bar luncheon.</p>
<p>Shuttle for Wine Luncheon leaves Fairmont 11:00 am Returns 3 pm</p>	<p><b>Wine Bar Luncheon</b> @ Enoteca La Storia, 416 North Santa Cruz Avenue, Los Gatos, CA. A casual wine bar with an Italian flair. Enjoy tasting local and international wine or beer selections, complemented by artisanal cheeses, cured meats, and other conversation starters. The surrounding Santa Cruz Mountains are home to over 70 wineries, producing award-winning wines since the 1800s.</p>
<p>5:30 pm - 8:00 pm</p>	<p><b>Welcome Reception</b>, Poolside @ the Fairmont, (4<sup>th</sup> floor) food and drink provided The SurePower User Group kicks off with a Monday evening reception poolside on the top of the elegant Fairmont San Jose Hotel. Please join fellow attendees and the ISCS team for an opportunity to get to know each other. Plan to network with new contacts, catch up with old friends, and meet the people from ISCS.</p>

## Tuesday, September 13, 2011

<p>7:30 am - 8:30 am</p>	<p>Breakfast Session: Introductions of Attendees <b>Club Regent Room, off the Fairmont Lobby</b></p>
<p>8:30 am - 9:15 am</p>	<p><b>ISCS and You: SurePower User Group &amp; ISCS Support Team Update</b> We’ll open our user group sessions with a thirty-minute discussion on achievements in the past year and goals for the user group in the coming year.</p>
<p>9:15 am - 10:15 am</p>	<p><b>SurePower Innovation—What’s New</b> Our Product Development Group has been busy! Myron Meier (VP Product Development) and Andy Scurto (president) will discuss the many features added in SurePower Innovation product releases in the past year.</p>
<p>10:15 am - 10:30 am</p>	<p>Morning Break</p>
<p>10:30 am - 11:15 am</p>	<p><b>SurePower Innovation—What’s Planned</b></p>
<p>11:15 am - 12:00 pm</p>	<p><b>SurePower Innovation –Your Ideas for Enhancements</b> An opportunity for you to share ideas for SurePower’s roadmap and discuss ideas submitted on the ideas portal.</p>

12:00 pm - 1:30 pm	Lunch & Networking, <b>Pagoda Restaurant, off the Fairmont lobby</b> Tables will be marked with signs for "Roles" including "Claims," "Underwriting," "Products & Programs," "Project Management," "Finance/Accounting," "IT VP/CIO," and "IT Admin/Services" to encourage discussion with colleagues at other companies that share a specialized interest.
1:30 pm - 3:00 pm	<b>"Power Tools" World Premiere: Demo</b> These tools are so new and so exciting in the range of areas they touch that we don't even have a name for them! We started with the name "Product Visualizer," but they do much more than give you visibility into your products. They are also "collaboration tools" that will help non-technical business users participate more easily in product configuration and changes, while speeding the work of technical users and making changes more visible and documentable for executive administrators. We are very excited to demonstrate these new ways to <i>accelerate</i> your business with SurePower Innovation!
3:00 pm - 3:15 pm	Afternoon Break
3:15 pm - 4:45 pm	<b>Agile Development &amp; SurePower Innovation: Bigger, Better, Faster Implementations</b> ISCS clients have experienced dramatic success via their adoption of agile practices when bringing insurance products online in SurePower Innovation, but no one will deny that bringing an organization into the agile world has a learning curve. This session will explore what your company can do to be successful working with ISCS's agile teams and touch on best practices to adopt the agile approach in your standalone efforts. <b>Panelists:</b> Roger Johnson, VP IT, Zenith AgriBusiness; Joe Shumaker, Manager, Mississippi Windstorm Underwriting Assoc.; Chris Belle, VP Consulting, ITS Data Services; and Leslie Holden-Mikesell, VP Professional Services, ISCS.
6:00 pm - 9:00 pm	Dinner <b>Morton's The Steak House, 177 Park Ave., San Jose, CA</b> (3 minute walk from Fairmont Hotel)

### Wednesday, September 14, 2011

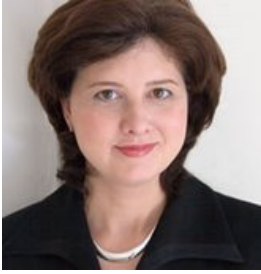
7:30 am - 8:00 am	Breakfast <b>Club Regent Room</b>
8:00 am - 10:00 am	<b>Keynote Speaker &amp; Interactive Workshop on the User Group's Organization</b> Don't miss this session! How can the user group evolve to benefit you more? What kind of engagement deepens partnerships and maximizes the value of the forum and community that is the SurePower Users Group? This is a thought-provoking keynote and an actual organizing session for the user group. All attendees are invited.  Jeannie Kahwajy, Ph.D., an expert on making organizations and leaders more effective, will facilitate an interactive workshop on how the SurePower User Group members can grow their own leadership, maximize what they gain from each other, and strengthen partnerships with ISCS.  Dr. Kahwajy has provided executive and organizational consulting to some of the best-known companies in the world. She is co-author of "How Management Teams Can Have a Good Fight," released as a Harvard Business Review Classic. This spring she was asked by Hillary Clinton to speak on leadership and effective interaction to a group of 160 US ambassadors. Her mantra is "If you don't get the people part right, nothing else matters." For more on Dr. Kahwajy's background, please see the biographies below.  A webinar connection will enable participation by SurePower Innovation User Group members unable to travel to San Jose. Please invite others in your company to join us.  <b>Some Specific User Group Goals for Workshop:</b> Define how members will increase their role in driving the User Group in 2011-2012 <ul style="list-style-type: none"> <li>• Define member user group leadership</li> <li>• Design a framework where users suggest and generate content</li> <li>• Define ways to expand the user group community</li> <li>• Develop plans to provide feedback and drive content (webinars, etc.) year-round</li> <li>• Define engagement with ISCS</li> </ul>
10:00 am - 10:15 am	Break

<p>10:15 am - 12:00 pm</p> <p><b>Concurrent Sessions</b></p>	<p><b>Location: Gold Room</b></p> <p><b>Product Development &amp; Maintenance</b></p> <p><i>Part I, 10:15-11:05 am</i></p> <p><b>Why Product Development has Gained in Importance</b></p> <p><i>to</i></p> <p><b>Maintaining Rates, Rules &amp; Forms: Major Costs, Often Inefficient Processes</b></p> <p><b>Karlyn Carnahan, CPCU, principal, Novarica (see bio below)</b></p> <p>Product development has become a principal competitive differentiator, in part because of increasing emphasis on growth. Karlyn Carnahan will give an overview of the state of industry, what carriers are doing, and Novarica’s predictions for the future.</p> <p>The discussion will include an examination of the efforts and costs needed to keep products current and competitive. Interpreting new information such as ISO circulars, deciding on actions and implementing changes is complex, labor-intensive and touches multiple functional areas.</p> <p>A Novarica study estimated the costs of an ISO circular that results in a form change and a rate change requiring total costs of approximately \$135,000. The most expensive portion of the process is the analysis, with the system update a close second.</p> <p>Use of ISO-based insurance products can seem a panacea, but ISO’s flood of monthly updates quickly show the “being ISO” doesn’t mean being easy. No matter the source of the information, how do we best manage it? What can we automate? Where are inefficiencies we can improve upon? As principal author of the study mentioned above, Karlyn Carnahan, brings special insight and the larger industry perspective to this topic.</p> <p><i>Part II, 11:05-11:30 am</i></p> <p><b>Where can SurePower Innovation and ISCS Services Provide Efficiencies?</b></p> <p><b>Andy Scurto, president, ISCS</b></p> <p>ISCS has been developing new maintenance tools (covered in Tuesday’s session). We also have a new integration of ISO Rating Service® with brief SurePower Innovation integration demo. This is a quick look at the new integration technology and discussion of the services and labor needed within the framework Karlyn has laid out and within the context of SurePower Innovation’s capabilities and services ISCS offers or is considering developing.</p> <p><i>Part III, 11:30-12:00 pm</i></p> <p>Attendee-driven discussion.</p>	<p><b>Location: Club Regent Room</b></p> <p><b>All Things Portals</b></p> <p><i>Part I, 10:15-11:15 am</i></p> <p><b>Direct Sales/Self Service and Independent Agents - Can the Two Coexist?</b></p> <p>Consumers are increasingly demanding access to an online portal for insurance sales and service. Is it possible to provide this Web-based service that consumers expect without disrupting the business of your independent agents? This session will explore how ISCS clients have tackled this problem.</p> <p><b>Panelists:</b> Roger Walker, COO, Cornerstone National Insurance Company; Matt Hull, VP Market Strategy and Business Development, CSE Insurance Group; Doug Moore, CTO, ISCS; and Phil Kiekhaefer, Director Marketing &amp; Usability, ISCS.</p> <p><i>Part II, 11:15-12:00 pm</i></p> <p><b>How do you see Portals Developing for your Company?</b></p> <ul style="list-style-type: none"> <li>• What do your agents want to do online?</li> <li>• What do your insureds want to do online?</li> <li>• What other third parties would you like to have access?</li> </ul> <p>Join the panel in a discussion of what kinds of functionality you see agents, producers or other third-parties needing from your system.</p> <p>What kind of experience you want them to have? This can include considerations of the “look and feel” of the user interface, its usability, and your branding.</p> <p>Portals also aren’t just for the Web anymore. The emergence of smart phones and tablets raises the question of access from other devices than a computer. How do the answers change when we ask the questions above for a different device?</p>
<p>12:00 pm - 1:00 pm</p>	<p><b>Lunch Pagoda Restaurant, off the Fairmont lobby</b></p>	

<p><b>Concurrent Sessions</b></p>	<p><b>Location: Club Regent Room</b></p> <p><b>ISCS Corporate Vision, Emerging Technologies</b></p> <p>Join Andy Scurto, ISCS president and Doug Moore, ISCS CTO, for a roundtable discussion of ISCS corporate vision, including technology and industry trends that will affect your business.</p>	<p><b>Location: Almaden Room</b></p> <p><b>Hands-on Workshop</b></p> <p>Step right up to one of the workstations with your questions—no appointment necessary!</p> <p>Walk-up opportunities to engage experts from</p> <ul style="list-style-type: none"> <li>• ISCS</li> <li>• iPartners</li> <li>• Perr&amp;Knight</li> </ul> <p>This session is designed for problem-solving discussions and, when possible, performing some changes or mapping the solution path.</p> <p>This is an opportunity to see the faces of those on the phone and meet others that are part of the brain trust addressing your issues, possibly providing a fresh perspective to an issue. And it is an opportunity for ISCS developers and ISCS partners to strengthen their relationship with you.</p>
<p>2:30 pm - 2:45 pm      <b>Afternoon Break</b></p>		
<p>2:45 pm - 3:45 pm</p> <p><b>Concurrent Sessions</b></p>	<p><b>Location: Club Regent Room</b></p> <p><b>Implementing iPartners Business Intelligence Capabilities to Enhance SurePower Innovation</b></p> <p>At last year’s user group meeting, we explored business intelligence options to leverage the data within SurePower Innovation. In the past year, ISCS has joined forces with iPartners, a leading provider of “on-demand” management information and analysis solutions for the P&amp;C industry.</p> <p>This session will explore an implementation of iPartners at Southern Pioneer P&amp;C Insurance Company, leveraging their existing SurePower Innovation system.</p> <p>Panelists: Eric Pearson, IT Officer, Southern Pioneer, and Tom DiMarco, principal and co-founder, iPartners.</p>	<p><b>Location: Almaden Room</b></p> <p><b>Hands-on Workshop (continues)</b></p>
<p>3:45 pm - 4:15 pm</p>	<p><b>Location: Club Regent Room</b></p> <p><b>SPUG 2011 Retrospective</b></p> <p>What are your takeaways from this year’s conference? What would you like to see the user group do in the coming year? We may also have an update from the new SurePower User Group Member Advisory leadership.</p>	
<p>6:00 pm and after</p>	<p><b>Location: TBD</b></p> <p><b>Evening Social</b></p> <p>For those staying in San Jose Wednesday evening, we will arrange a group activity option.</p>	

## Speaker Biographies

### Keynote & Interactive Workshop Leader:



**Jean L. (Jeannie) Kahwajy, Ph.D., MBA**

**Let's Kickoff the SurePower User Group's Member Leadership!**

**Wednesday, Sept 14, 8 am – 10 am.**

Have you ever noticed that you think differently with different people? What has made one conference valuable for you and another not so much? How we engage with others can limit or increase the value we find in a forum like the SurePower User Group. The science of interpersonal interaction in business and partnership settings offers concrete strategies to improve our communication, participation, and effectiveness.

What can make the SurePower User Group the type of group that delivers great value to you and others in your organization? ISCS sees great technical and business talent in its customers, and acknowledges the value-add to its technology that has come from productive customer partnerships solving business challenges. It would like to support the user group's growth as a valued part of its partnership with its customers. Wednesday from 8:00 am to 10:00 am, ISCS invites you and your peers to help define the direction of the group. We hope you can attend! Please come ready for a fun, informative and potentially inspiring workshop.

Dr. Jeannie Kahwajy is the founder and president of Effective Interactions, a research and consulting firm that specializes in personal effectiveness and organizational achievement. She is an expert in the mechanism of interpersonal influence. She focuses on the fundamental human-relations issues in leadership and relationship: how to be heard, how to turn around difficult situations, how to help people explore new ideas, and how to get people to want to follow you.

Dr. Kahwajy has shared her innovative approach with senior executives around the globe, including clients in the Fortune 100 and high-growth start-ups alike. In February 2011, she addressed 160 US Ambassadors and the top 50 US Department of State officials at their first ever leadership summit. Her *Harvard Business Review* article "How Management Teams Can Have a Good Fight" has recently been named an HBR Classic.

Dr. Kahwajy's powerful theory of interpersonal interaction has immediate application to real-world situations and has been shown to dramatically improve learning, negotiation, decision-making, and creativity. Her unique communication model dissects the subtle differences that make an interaction productive or counter-productive. She takes a systems and scientific approach to interactions that explains why people often get in the way of their own best outcomes and shows how one person is sufficient to effect a change. She gets beyond descriptions of what to do and shares prescriptions of how to do it.

Dr. Kahwajy offers individual and group advising, as well as workshops and keynote speeches on leadership effectiveness, interpersonal influence, teamwork, and change. Her unparalleled ability to diagnose specific challenges and translate theory into learnable skills enables individual leaders or teams to quickly begin transforming themselves and their relationships to achieve breakthrough results.

Dr. Kahwajy developed her ideas over more than 20 years of academic study and real-world application. At Stanford University she earned an MS in decision sciences, an MBA from the Graduate School of Business, and a PhD in organizational behavior. She also holds a BS in systems engineering from the University of Virginia. She has served as a management consultant based in Silicon Valley and as a Professor of Organizational Behavior and Leadership at IMD in Lausanne, Switzerland. She has also held positions in systems engineering, technology marketing, and equity derivatives. She assisted the Czech Ministry of Privatization in the early 1990's as part of a USAID team and has been a fellow with the Stanford Center on Conflict and Negotiation. She continues to teach in executive MBA programs worldwide.



## Speaker

**Why Product Development has Gained in Importance to Maintaining Rates, Rules & Forms: Major Costs, Often Inefficient Processes**

**Wednesday 10:15 am to 12:00 pm, with Andy Scurto, ISCS president**

**Karlyn Carnahan** is a principal in Novarica's insurance practice, focused on claims, distribution, and IT planning. Karlyn is the primary researcher and author of the market leading reports on claims core systems, reinsurance, and Web 2.0 and is a widely recognized expert on these topics who has presented at numerous conferences and conducted numerous vendor selection projects for US insurers.

She joined Novarica with an extensive career in the insurance industry including serving as Vice President of Marketing for Fireman's Fund commercial lines division, where she successfully launched multiple industry programs, expanded online customer self-service capabilities, and took a leading position in formulating IT strategy.

She also served as Global Industry Manager for Sun Microsystems and Senior Vice President of Product Development for InsWeb. Earlier in her career, she held a variety of marketing and underwriting positions at NORCAL and Fireman's Fund.

She holds an MBA from Stanford Business School and a Certified Property Casualty Underwriter (CPCU) designation.

### **Research Areas:**

Karlyn regularly conducts Novarica's research on Claims systems and topics.

She also conducted the research and wrote the Novarica report "Typical Internal Processes for ISO Circulars," published September 2010, that prompted ISCS's discussion with her on the topic she will be speaking on at the SurePower User's Group Meeting.

Karlyn's recent research includes being a principal author of Novarica's New Market Navigator for US Distribution Management Solutions, published in August 2011.

Also in August, she co-authored a report on the results from 2008, 2009, and 2011 surveys on social media. This report intended to capture a snapshot of insurance carrier's current practices and attitudes towards various social media areas and how these have changed, with a focus on their application to key insurance areas such as customer communication, distribution, underwriting, claims, and especially the general challenge of internal communication and knowledge management.

Also in August, Karlyn also co-authored Novaria's report "Increasing the Odds of Offshore Success: Best Practices in Business Process Outsourcing (BPO)," based on direct observations of several BPO centers in India during 2011.

# Frequently Asked Questions

## Can you describe the conference?

Pre-conference activities on Monday include either a day of golf or a luncheon and wine tasting at a wine bar, so plan on arriving by Sunday night if you would like to join in the golf early Monday morning or the wine bar visit midday. The user group meeting kicks off with a welcome reception Monday evening at 5:30pm at the Fairmont Hotel. We will have some members of ISCS staff at the reception who will not be at the sessions, so this is the best opportunity to meet some staffers.

The conference is two days beginning Tuesday with breakfast & introductions 7:30 am to 8:30 am and 30-60 minute sessions from 8:30 a.m. to 4:45 pm. Dinner is at Morton's The Steak House, 177 Park Ave., a 2-3 minute walk from the Fairmont. Wednesday breakfast is at 7:30 a.m. with sessions from 8:00 am to 4:15 pm, so return travel either Wednesday night or Thursday should be planned. For those staying Wednesday night, we can plan a group dinner or activity, depending on interest.

The sessions include presentations by ISCS with time set aside for attendee questions and discussion. This year we will continue last year's popular addition of user-led sessions. This is the third year we are offering a "hands-on workshop," where you can work with the developers that you normally only "meet" over the phone. This is an opportunity to map out a strategy for a problem and when possible, even make some changes.

This year's theme is *"Accelerate Your Competitive Advantage with SurePower Innovation."* SurePower Innovation has been put to work in many innovative ways to improve how you do business. We'd like the meeting to assist a sharing of what's been learned by the user group attendees and the ISCS staff whom they have worked with. Our goal is to put on a conference that builds relationships that help you achieve your work goals more easily. We hope you will bring home ideas that you can put in practice to increase your organization's business value.

## Who can attend the SurePower User Group Meeting?

The meeting is open only to ISCS clients, potential clients, partners, and invited guests.

## How much does it cost?

Lodging and transportation to the conference are the responsibility of the attendee.

There is no registration fee for attending the user group conference. Meals in the agenda are included. Golf and transportation to and from the golf course via shuttle are included, as is the Wine Bar Luncheon concurrent with golfing and transportation to and from the venue.

## What are the closest airports?

San Jose's Norman Y. Mineta International Airport (SJC) is located three miles from the hotel. Taxis to and from Norman Y. Mineta International Airport cost approximately \$20 to \$25. San Francisco (SFO, 37 miles from downtown San Jose) and Oakland (OAK, 36 miles from downtown San Jose) airports are also options, particularly if you are renting a car. Parking at the Fairmont is \$26 per night.

## How do I book my hotel? Is there a group rate?

To book your hotel at the Fairmont hotel, call toll free at 1(866) 540-4493 and ask for group rate for the "SurePower User Group Meeting." ISCS has secured a discount group rate of \$149 per night for a traditional room. The rate is subject to availability, so please book your hotel early. [As of 8-23, the group block has filled - contact [Kathryn.Chostner@iscs.com](mailto:Kathryn.Chostner@iscs.com) for assistance reserving a room at the discounted rate.]

## What is the recommended attire for the conference?

Business casual attire is appropriate.

## What is the weather like in San Jose in September?

September usually brings sunny, warm days in the 70s and cooler evenings, so be sure to pack a jacket or sweater.

## Whom do I contact if I have questions?

Please direct your questions to [Kathryn.Chostner@iscs.com](mailto:Kathryn.Chostner@iscs.com) (510) 292-8930