

*Management, Operations & Technology*

# **Investing in Operations: When is Enough, Enough?**

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**17th Annual Intercompany Long Term Care Insurance Conference**



## **Moderator:**

Jodi Anatole: President, Endeavour Consulting

## **Panel Members:**

Peter Lucas: CEO, TriPlus Services

Dan McCoach: CIO & Head of Operations, Nassau Re

Mary Swanson: VP & Actuary, Mutual of Omaha

Steve Zabel: President Closed Block Operations, UNUM

# Approach to Today's Session



- **Q & A Format – Prepared Questions**
  - **General Operations**
    - How decisions are made
    - The IT funding struggle
    - Combining functions internally
    - Why consider outsourcing
    - Different outsourcing models
  - **LTC Specific**
    - Group vs individual strategy
    - Size of the block
    - Impact of service Levels
    - Is there an advantage to utilizing a TPA

# Approach to Today's Session Cont'd



- **Outsourcing**
  - Advantages of a TPA
  - Why carriers may change TPA's
  - Advantages/disadvantages of a multiple TPA strategy
  
- **Audience Questions**