



WELCOME TO USI'S INNOVATION SYMPOSIUM

March 15
2024 | 7:30 am to 5 pm

Embassy Suites
5800 Rockside Rd., Independence, Ohio 44131

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Hello & Welcome

We are so happy that you are joining us today for USI's Innovation Symposium. USI recognizes the unique challenges you face within employee benefits. Today we have brought together professionals from across the country with clinical experience in the industry to help you find innovative and impactful health solutions to help manage your employees' health conditions and provide cost containment.

We will take a deeper dive into the types of solutions we have found to produce a positive impact on the populations of our client partners. We hope this opens your eyes to the wide variety of solutions that can be offered to your workforce.

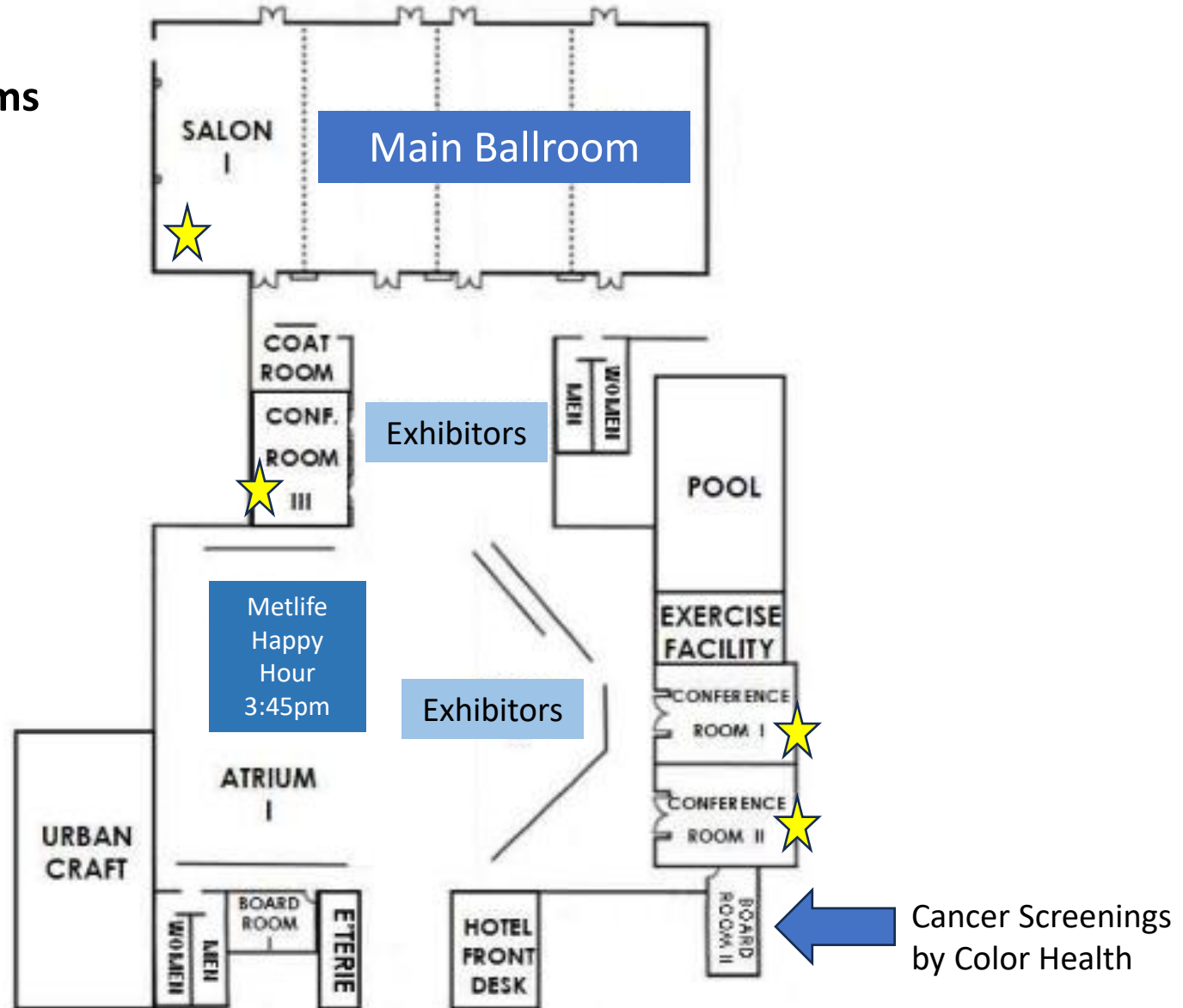
If you have any questions or concerns throughout the Symposium, please do not hesitate to reach out to a member of the USI Team. We hope you leave today feeling energized and empowered, both personally and professionally.

Best of Health,

Your Northeast Ohio Employee Benefits Team at USI

Innovation Symposium Map

★ = Breakout Rooms



Symposium Schedule

7:30 AM – 8:15 AM
Networking, Vendor Fair
and Breakfast

8:15 AM – 8:30 AM
Opening Remarks –
Emily Adams, USI Cleveland

Breakout Session 1 - *Attend 1 of the breakout sessions below*

8:30 AM – 9:15 AM

Salon One: Price MDs - Direct Sourcing of Specialty Medications

Conference Room 1: Bravo Health - Leveraging Wellness to Tackle Health Debt

Conference Room 2: Surest - See How Powerful Simple Can Be

Conference Room 3: True Scripts - Specialty Rx Cost Containment Without the Heartache

Boardroom 2: Courtesy Cancer Screenings by Color Health – *On-going throughout the day*

9:15 AM – 9:30 AM

Intermission and Vendor Fair

Breakout Session 2 - *Attend 1 of the breakout sessions below*

9:30 AM – 10:15 AM

Salon One: USI - Compensation Market Trends: A New Era of Compensation

Conference Room 1: Crossover Health - Scaling Advanced Primary Care

Conference Room 2: Omada Health and USI - The Importance of Compassionate Care in Virtual Health Settings

Conference Room 3: Pareto Health - Leveraging Captives to Provide Stronger Risk Management and Cost Containment Levers

Boardroom 2: Courtesy Cancer Screenings by Color Health – *On-going throughout the day*

10:15 AM – 10:30 AM

Intermission and Vendor Fair



Symposium Schedule

Breakout Session 3 - *Attend 1 of the breakout sessions below*

10:30 AM – 11:15 AM

Salon One: USI Communications - The Myth of Multi-Generational Communication

Conference Room 1: USI Retirement & Capital Group - Critical Trends in Employer Retirement Benefits

Conference Room 2: USI Compliance Trends and Updates to Follow in 2024: What You Need to Know

Conference Room 3: Voya & Gradient AI - Artificial Intelligence: Impacts and Opportunities for Group Health Plan Sponsors

Boardroom 2: Courtesy Cancer Screenings by Color Health – *On-going throughout the day*

Lunch Break – Vendor Fair

11:15 AM – 12:00 PM Lunch

12:00 PM – 12:45 PM **Keynote Speaker – Alex Sheen** - Main Ballroom
World Renowned Author and Founder of the Movement
“Because I Said I Would”

12:45 PM – 1:00 PM Intermission, Vendor Fair Visit and Alex Sheen Meet & Greet



Symposium Schedule

Breakout Session 4 - *Attend 1 of the breakout sessions below*

1:00 PM– 1:45 PM

Salon One: USI Pharmacy - The Future Cost Implications of Diabetes and Weight loss Drugs: What's Your Plan?

Conference Room 1: Paylocity - The Culture Continuum: Navigating Organizational Identity in a Remote Era

Conference Room 2: The Difference Card - Alternate Funding Solutions

Conference Room 3: Wellthy - Unmistakable ROI: Understanding the Economic Benefits of Supporting Employee Caregivers

Boardroom 2: Courtesy Cancer Screenings by Color Health – *On-going throughout the day*

1:45 PM– 2:00 PM

Intermission and Vendor Fair

Breakout Session 5 - *Attend 1 of the breakout sessions below*

2:00 PM – 2:45 PM

Salon One: USI, Wellworks & Northstar - Mind, Body, Money

Conference Room 1: Ahola - Attract, Engage, Retain: Mastering Total Rewards in 2024

Conference Room 2: DailyPay - The Benefits of Earned Wage Access: Attraction, Retention, and Engagement

Conference Room 3: Allsup - Understanding Medicare-Age Workers and their Healthcare Perspectives

Boardroom 2: Courtesy Cancer Screenings by Color Health – *On-going throughout the day*

2:45 PM – 3:00 PM

Intermission and Vendor Fair



Symposium Schedule

Breakout Session 6 - *Attend 1 of the breakout sessions below*

3:00 PM– 3:45 PM

Salon One: Willory and USI – CEO Mindset Unleashed, Elevate Your Leadership Potential

Conference Room 1: Garner Health - How Providing Employees with Access to Quality Healthcare Improves Outcomes and Lowers Costs

Conference Room 2: Color Health - Moving from Reactive to Proactive: Early Detection in Cancer Care to improve Employee Health and Curb Costs

Conference Room 3: Capital RX - PBM Pricing and Questions to Ask your Pharmacy Benefit Manager/Carrier

Boardroom 2: Courtesy Cancer Screenings by Color Health – *On-going throughout the day*

Happy Hour Sponsored by MetLife - *Atrium*

3:45 PM – 5 PM

Meet Our Speakers

Breakout Session 1 – Salon 1



Dante Panella
Co-founder, Price MDs
[LinkedIn](#)

Price MDs

Direct Sourcing of Specialty Medication

Join co-founder of Price MDs, Dante Panella, for a discussion around cost containment solutions in pharmaceutical treatments and surgical procedures. This presentation will also cover:

- Regulatory Compliance
- PriceMDs Best in Class operations and quality service
- Average 30% savings with service guarantee
- No cost to add the PMD program and the client's price is locked in for one year

Who should attend: 100+ employee groups, self-insured

Breakout Session 1 – Conference Room 1



Nicole Grasso
VP, Partner Success & Marketing
[LinkedIn](#)

Bravo Wellness

Leveraging Wellness to Tackle Health Debt

The 2020 global pandemic put a spotlight on, and compounded, the national pandemic of increasing health risks that could be controlled with lifestyle change. Our clients continue seeking ways to reward employees who embrace well-being engagement as a way to learn about personal health risks, health plan resources to manage risk, and participation in resources that support reducing health risk. Programs must include all facets of well-being – physical, mental/emotional, social, and financial. Our presentation will spotlight an Ohio-based health system's wellness program that is driving engagement, results, and high satisfaction scores from administrators and employees alike.

Who Should Attend: Self-funded employers with 500+ employees

Meet Our Speakers

Breakout Session 1 – Conference Room 2

Surest

See How Powerful Simple Can Be

Surest is a copay-only health plan with clear pricing in advance. Join us for a review of the Surest health plan, how it works, and how our health plan can benefit BOTH the member and the plan sponsor. Surest, a UnitedHealthcare company, is an ACA-compliant employer-sponsored health plan available to employers with 25+ employees — offered on a fully insured and self-funded basis

Who should attend: Both fully and self-Insured groups, 100+ employees



**John Chabot, National Mid-Market
Sales Leader**

[*Surest*](#)
[LinkedIn](#)

Breakout Session 1 – Conference Room 3

True Scripts

Specialty Rx Cost Containment Without the Heartache

Most plan sponsors are experiencing a specialty Rx dilemma, whether they are aware or not. What distinctive strategies do you employ to manage and control specialty drug costs? Gain insight into the options available, to not only help your plan, but your employees and their families as plan participants. We will discuss the levers to manage specialty medications in a holistic, compliant approach without restricting patient access to care and containing the rising costs of the plan to ultimately enhance your benefits package.

Who should attend: Self-insured and fully insured, 100+ employees.



**Tom Brew
Director of Business Development**

[*TrueScripts*](#)
[LinkedIn](#)

Meet Our Speakers

Breakout Sessions 1 through 6 – Boardroom Two – Courtesy Cancer Screenings Throughout the Day
Breakout Session 6 – Conference Room 2 - Presentation



Caroline Whitman
Director of Partnerships
and Market Development

[LinkedIn](#)

Color Cancer Screenings

Moving From Reactive to Proactive: Early Detection in Cancer Care to Improve Employee Health and Curb Costs

In the world of healthcare expenses, cancer consistently leads the pack, becoming a top financial burden for both employers and their employees. Yet, many benefit plans remain reactive, waiting until cancer reaches more advanced and costly stages before taking action. Why wait for cancer costs to escalate when you can proactively address them now? Join us to learn how your clients can adopt a more proactive, comprehensive approach to cancer cost management, combining at-home and distributed cancer screening, educational resources, and care navigation services to detect cancer earlier among employees.

Who Should Attend: Everyone

Breakout Session 2 – Salon 1



Jen Givens, MBA, CCP
Managing Director
of Compensation
USI Insurance
[LinkedIn](#)

USI Insurance

Compensation Market Trends: A New Era of Compensation

As we enter 2024, we are also entering a new compensation era. A tight labor market, new legislation around pay transparency, and artificial intelligence are a few topics challenging the way organizations design and execute compensation programs. This session will focus on what employers need to consider during this pivotal time.

Who should attend: Everyone

Meet Our Speakers

Breakout Session 2 – Conference Room 1

Crossover Health

Scaling Advanced Primary Health

Crossover Health will discuss how they are innovating to provide equitable access to preventive health, including primary care, mental health, physical therapy and musculoskeletal conditions, occupational medicine, health coaching, and care navigation to employers of varying sizes and industries. Whether you have a headquarters location with an on-site health center or a dispersed population across the US, Crossover Health offers multiple modalities to reach all.

Who should attend: Self-insured employers with 250 employees or greater



Katie Hakimi
VP, Channel Team Lead
[LinkedIn](#)



Dan Lord, DDC
Regional Medical Director
[LinkedIn](#)

Breakout Session 2 – Conference Room 2

Omada Health

The Importance of Compassionate Care in Virtual Health Settings

In the rapidly evolving landscape of healthcare, the integration of virtual health solutions has emerged as a transformative force in effective care delivery. However, virtual care is oftentimes seen as a transactional service that lacks emotional connection and compassion. This presentation aims to explore the intersection of technology and empathy, highlighting how virtual health solutions can enhance patient experiences and foster a more compassionate healthcare ecosystem by providing more accessible and convenient care when a member needs it the most.

Who should attend: Anyone offering telemedicine solutions for their members and interested in evaluating healthcare delivery models for their workforce.



Kevin Masci
Senior Director of
Clinical Strategy
[LinkedIn](#)



Emily Adams
VP, Employee
Benefits Consultant
[LinkedIn](#)

Meet Our Speakers

Breakout Session 2 – Conference Room 3



Dave George

Regional Vice President

[LinkedIn](#)

Pareto Health

Leveraging captives to provide stronger risk management and cost containment levers

This session will cover looking at a healthcare decision that is typically 12 months through a 10-year lens and how to save money on group health insurance outside of plan design changes or pushing costs back to employees.

Attendees can expect to learn the value of captives including the pillars:

- Transparency
- Stability
- Control
- Ownership

Who should attend: Any employer over 50 enrolled in a fully insured, level-funded or self-funded arrangement

Breakout Session 3 – Salon 1

USI Insurance

The Myth of Multigenerational Communication

With multiple generations currently in the workforce, is your benefits communications strategy keeping up? Is there really a magic formula for successfully engaging your employees across every generation? Let's talk about it and make a plan for successfully reaching your team, without adding headcount or more work to your plate.

Who should attend: Everyone



USI Insurance

Lindsay Rink

Communications Consultant

[LinkedIn](#)

Meet Our Speakers

Breakout Session 3 – Conference Room 1

USI Consulting Group and Capital Group

Critical Trends in Employer Retirement Benefits

A discussion on the ever-evolving landscape of employee retirement benefits covering topics ranging from regulatory updates on SECURE 2.0 to fiduciary responsibilities to current Best Practice trends for Plan Sponsors

Who should attend: Everyone



Patrick Edwards
USI Insurance
Vice President, Retirement
Services
[LinkedIn](#)



Earnie Niemi
Capital Group
Sr. VP Retirement
Plan Counselor
[LinkedIn](#)

Breakout Session 3 – Conference Room 2



Christina Nechiporchik
Attorney
[LinkedIn](#)

USI Insurance Services

Compliance Considerations for Gene Therapy, GLP-1s, and Other Compliance Trends.

Employers continue to face rising healthcare costs, particularly with gene therapy and weight loss drugs. Please join us to learn how to control these costs in a compliant manner and discuss other emerging compliance trends.

Who should attend: Everyone

Meet Our Speakers

Breakout Session 3 – Conference Room 3



Jon Russ
Underwriting & Claims
Account Executive
Gradient
[LinkedIn](#)



Matt Weaver
Senior Sales Director
Voya
[LinkedIn](#)



Brian Scott
Director of Stop Loss
Voya
[LinkedIn](#)

Gradient AI and Voya

Artificial Intelligence: Impacts and Opportunities for Group Health Plan Sponsors

Workplace benefits solutions provider and insurance company Voya Financial and Artificial Intelligence and predictive analytics firm Gradient AI will be discussing how health plans can gain new health plan insights. Even when data from existing vendors isn't complete, newly developed and rapidly developing technology is now available that can uncover more than ever before about both the past and what's likely to happen in the future. Decision makers for group health plans will not want to miss this opportunity to hear more about how they can potentially benefit from these new tools being added to a marketplace where the stakes of getting it right – and for many, the cost of doing so – seem to always be going up.

Who should attend: Everyone

Keynote Speaker

Alex Sheen, Because I Said I Would

12:00 PM – Main Ballroom

As one of the world's foremost experts on accountability and commitment, Alex is a five-time TEDxTalk speaker, [author](#), [podcast](#) host, internationally-recognized humanitarian and Founder of the *because I said I would* movement. His work has been featured on the TODAY Show, Good Morning America, the Steve Harvey Show, CNN, Fox News and many other programs.

Click on the image below to hear his most recent Ted Talk:



**Alex Sheen, Founder
Because I Said I Would**

Alex Sheen, Inspirational Speaker



Meet Our Speakers

Breakout Session 4 – Salon 1

USI Pharmacy

The Future Cost Implication of Diabetes and Weight Loss Drugs: What's Your Plan?

With the development of innovative diabetes and weight loss drugs, more specifically the GLP-1 drugs, many employers are challenged with managing these drugs on their pharmacy benefit plan. This program is intended to provide an overview of the 2024-2025 landscape for diabetes and weight loss drugs, strategies for cost mitigation, and innovative solutions. Other high-cost drug management strategies will also be discussed.

Who should attend: Everyone



Marc Sweeney
Pharm.D., BCMAS
[LinkedIn](#)

Breakout Session 4 – Conference Room 1



Shari Simpson
Senior Manager, Thought
Leadership
[LinkedIn](#)

Paylocity

The Culture Continuum: Navigating Organizational Identity in a Remote Era

Explore 'The Culture Continuum' and master the art of maintaining a vibrant organizational identity in the remote era. This concise session unveils strategies to foster a unified culture and identity across dispersed teams. We'll dive into effective tools and practices that ensure every remote and in-office member feels valued and connected. Get ready to learn how to weave a strong cultural fabric that transcends physical boundaries, creating an inclusive, engaging work environment for all. Ideal for HR professionals aiming to champion a cohesive culture in a changing workplace landscape.

Who should attend: Everyone

Meet Our Speakers

Breakout Session 4 – Conference Room 2

The Difference Card

Alternate Funding Solutions

Josh will be discussing a creative way to reduce an organization's healthcare spend WITHOUT reducing employee benefits or increasing employee contributions. Medical Expense Reimbursement Plans offer a way to mitigate fixed costs and reduce carrier premiums while maintaining a group's same coverage amounts.

Who should attend: Fully insured and Level-Funded employers of any size



Josh Pyzik
Senior Consultant
[LinkedIn](#)

Breakout Session 4 – Conference Room 3

Wellthy

Unmistakable ROI: Understanding the Economic Benefits of Supporting Employee Caregivers.

There are conservatively 70 million employees today balancing work on top of intense caregiving responsibilities at home — so much so that today more than 20% of every company's workforce identifies as a caregiver. The scale and scope has gotten so large that companies and employers can no longer afford to ignore it. New research from Harvard Business School — built on years of analysis of working caregivers — shows that companies see a significant and material return on investment when they support their employee caregivers. And it takes shape in several profound ways:

- Avoiding incurring large and consequential hidden costs due to the productivity impact of family caregiving on an employee;
- Ensuring that promising and rising talent doesn't leave the workforce — companies retain their best employees;
- Company and organizational culture and morale — especially as it relates to diversity, equity, and inclusion— is enhanced and employee well-being thrives

Who should attend: Employers with 250+ employees



Kristin Spodobalski
VP of Sales
[LinkedIn](#)



Brent Herlong
Account Executive
[LinkedIn](#)

Meet Our Speakers

Breakout Session 5 – Salon 1



Cory Panning
Population Health
Management
Consultant
USI Insurance
[LinkedIn](#)



Tom Tegler
President
Wellworks for You
[LinkedIn](#)



Audrey Gutensohn
Consultant Relations
Specialist
Northstar
[LinkedIn](#)

USI Insurance Services, Wellworks for You, & Northstar

Mind Body Money

Today's workforce has many stressors that impact their workforce readiness. Mental, physical, and financial stress all impact an employee's ability to be productive. Employees with unmanaged stress often have increased absenteeism, reduced productivity, higher medical claims, and higher turnover.

USI's team of experts has designed a holistic solution to help employers address employees' stressors.

USI's **Mind Body** of the incentive is a financial screening through a financial wellness vendor. These pro**Money** strategy incents members to engage with Primary Care Physicians (PCPs) for annual physicals and behavioral screenings to identify those with undiagnosed or unmanaged conditions and take steps to improve their health.

Who should attend: Anyone looking for a unique way to focus on wellness programming.

Breakout Session 5 – Conference Room 1

Ahola

Attract, Engage, Retain: Mastering Total Rewards in 2024

Join Mark Strippy, President of Ahola Payroll & HR Solutions, as he dives into the top trends shaping total rewards in 2024. Discover how to:

- Move beyond salary: Craft a rewards package that values more than just a paycheck.
- Embrace flexibility: Attract and retain top talent with remote, hybrid, and compressed work options.
- Prioritize well-being: Invest in financial wellness programs, mental health support, and skills development.
- Boost engagement: Recognize and reward achievements to build a loyal and productive workforce.
- Tailor your strategy: Understand your unique workforce and create a package that resonates with them.

This session is packed with practical insights and actionable strategies to help you navigate the evolving total rewards landscape and build a strong employer brand.

Who should attend: HR professionals in companies with 20-500 employees



Mark Strippy
President
[LinkedIn](#)

Meet Our Speakers

Breakout Session 5 – Conference Room 2

DailyPay

The Benefits of Earned Wage Access: Attraction, Retention, and Engagement

Imagine a benefit that won't cost your clients a dime but will save them thousands on recruiting costs. Or a benefit that will help your clients' employees pay bills on time and live a better financial life? In this session, we'll uncover how earned wage access serves as a powerful tool for attracting top talent, enhancing employee retention rates, and boosting overall engagement within your organization. Veteran HR leader Jon Lowe will sit down with DailyPay Partnership Executive Tara McMillen to discuss how earned wage access (on-demand pay) has emerged as the must-have financial wellness benefit that is truly a win-win for employers and employees alike.

Who should attend: 400+ paid employees (many hourly), especially in industries such as restaurants, hospitality, manufacturing, and retail



Jonathan Lowe
Chief People Officer
[LinkedIn](#)



Tara McMillen
Senior Manager,
Partnerships
[LinkedIn](#)

Breakout Session 5 – Conference Room 3

Allsup



**David Weiler, Director of
Business Development**
[LinkedIn](#)



**Rob Sokol, CMSP
Director of Business
Development**
[LinkedIn](#)

Understanding Medicare-Age Workers and their Healthcare Perspectives

Allsup will share what employees, aged 62 and over, are really saying about their healthcare perspectives. These often include understanding Medicare and how it compares to their employer group health plan to make informed decisions. They want to know their options and can struggle to understand the best choice for their healthcare needs based on their particular medical and financial situation. Join us for this session, where we will introduce the results of a national survey of Medicare-eligible workers to help us identify what an employer needs to know to address employee questions about Medicare, the key cost drivers for both employer and employee, and the traps that may imperil an employee's decision. We will share real-world plan analyses that compare Medicare to actual employer-sponsored plans and how Allsup can create well-informed and more satisfied healthcare recipients, resulting in better coverage at reduced costs for both the employer and the employee.

Who should attend: Everyone

Meet Our Speakers

Breakout Session 6 – Salon 1

Willory

CEO Mindset Unleashed: Elevate Your Leadership Potential

Have you ever pondered the distinctive qualities that set CEOs apart within an organization? We'll explore how slight changes in your approach and focus can lead to exceptional results for you and the organization. Embark on a transformative journey with John Bernatovicz, author of "HR Like a Boss," and John Gallagher, HR Leader turned USI Consultant, as they guide you through the art of thinking like a CEO. Discover strategic insights on prioritizing your efforts, overcoming fears and obstacles, and aligning purpose, productivity, and profitability. Elevate your leadership potential and unlock the secrets to achieving your desired outcomes in this illuminating exploration of executive thinking.

Attendees of the Willory session will receive a complimentary copy of John's book "HR Like a Boss".

Who should attend: Everyone



John Bernatovicz
Founder
Willory
[LinkedIn](#)



John Gallagher
VP, Employee Benefits
Consultant
USI Insurance
[LinkedIn](#)

Meet Our Speakers

Breakout Session 6 – Conference Room 1



Joana Ames

Vice President of Sales

[LinkedIn](#)

Garner Health

How Providing Employees with Access to Quality Health Care Improves Outcomes and Lowers Costs

Please join us to discuss strategies for helping employees become better healthcare consumers. In this session, you'll learn more about how helping employees choose a high-quality doctor can help reduce the total cost of care by 27%.

Who should attend: Employers with 50+ employees (fully insured and self-funded)

Breakout Session 6 – Conference Room 3



Brian Teneyck

National Director

[LinkedIn](#)

Capital Rx

PBM Pricing and Questions to Ask Your PBM/Carrier

Presentation details:

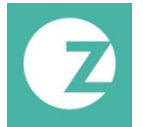
- PBM pricing structures (AWP vs NADAC) and why it matters
- What to focus on to ensure your PBM is driving savings
- Some key questions every plan sponsor should be asking their PBM or Carrier
- How can modern technology improve efficiencies for the PBM and the plan sponsor
- Moving from fully insured to self-funded, what options are available?

Who should attend: Fully insured moving to self-funded and self-funded groups

Thank you to our sponsors!



because I said I would.





Thank You
for attending
the 2024 USI
Innovation Symposium