



# VIRTUAL 40TH NATIONAL CONFERENCE EARNS HIGH MARKS

Written By Bruce Shutan

It has been a year like no other, with business travel crawling to a halt and scores of conferences being replaced by virtual events. But silver linings can be found in these uncertain times, and members of the Self-Insurance Institute of America were among the beneficiaries.

With nearly 50 educational sessions, SIIA's virtual 40th Annual National Conference & Expo delivered the most self-insurance and captive insurance content that has ever been included as part of a single event.

It also was accessible to all SIIA members without the need for travel and hotel accommodations.

The virtual format was a bit hit with 93% of attendees who responded to a post-conference survey indicating that they had a positive experience.

Several attendees noted that the daily virtual sign in had the look and feel of an in-person event.



Laura Carabello

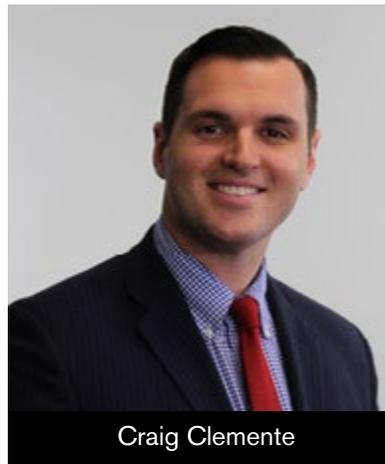
“The graphics they used for the openings and various events were just spectacular and very compelling,” recalls Laura Carabello, a principal with CPR Strategic Marketing Communications who has been involved with SIIA for nearly a decade, the past few years of which as a member of SIIA’s International Committee. “You almost felt like you

were walking into a building when you got online with this conference.”

Craig Clemente, chief operating officer for Specialty Care Management who was both a speaker and attendee, marveled at the show’s live feel.

He was most impressed with the distribution of information, ability to have live chats and schedule appointments between sessions. “I thought they did a really good job of carrying as much of the value of a live conference over into the online environment as they could,” says Clemente, a SIIA member for 13 years who has spoken many times at the group’s meetings.

As a speaker, Clemente missed the energy and “a feel for what the room is looking for” but found SIIA’s virtual format well-coordinated and user-friendly. “I just thought that there was a lot of continuity and consistency in the way that they presented everything,” he observes.



Craig Clemente

## VIRTUAL CONFERENCE FATIGUE

Dani Kimlinger, Ph.D., CEO of MINES and Associates, was in the enviable position of being a speaker, exhibitor and attendee. A participant in SIIA’s annual national conference since 2013, she had been suffering all year from virtual conference fatigue.

However, SIIA’s event far exceeded her expectations. She was impressed with all the preplanning for speakers and exhibitors weeks before the conference in terms of setting a tone, walking everyone through the technology platforms and organizing the event.

She also appreciated establishing a rapport with other speakers of her pre-recorded panel discussion. “We all offered a lot of different perspectives,” says, adding that the session moderator was strong, personable and funny.

Kimlinger enjoyed what she calls “rolling conversations” in the conference lounge and participated in a discussion thread through which fellow SIIA Future Leaders members shared helpful resources and perspectives.

Clemente also was partial to the lounge feature and weighed in quite a bit in the SIIA Future Leaders discussion thread. “We had a great kind of back-and-forth relative to all the topics of the day,” he recalls. “It was a very organic way to interact with other attendees and have a bit of a think tank and some open dialogue about what we heard from the keynote speaker, especially the first one, because she spoke directly to that subset of Millennials.”

“I go to a lot of virtual conferences, and I have to say this one was probably the best,” Carabello says. “There were no hitches to getting registered or involved with various presentations. It just went smooth as silk...That’s almost a miracle in today’s Zoom world.”

She also appreciated not having to choose among interesting presentations that were being held at the same time.

As such, she was more inclined to step outside her wheelhouse. “I could attend presentations that may not have been in my realm previously,” she said, citing the captive insurance topic as an example. “I think that was an advantage.”



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Dani Kimlinger

Since the virtual format can be almost invisible to participants, Carabello benefited from it in numerous ways. "You could be like a silent observer," she says. "I didn't feel like I had to dress up every day and put on makeup and wear heels and put on a great outfit because nobody saw me... It makes it more relaxed."

The virtual format also helped boost attendee stamina. "I didn't feel as exhausted or fatigued, and I think our

team also had a better experience than I think we were all expecting," Kimlinger observes.

Carabello was able to pace herself. "I could take a break, listen to a presentation, go back to work, resume my business, and still feel like I was part of a conference," she notes.

Whereas some Zoom meetings are fractured and poorly staged, Carabello says the SIIA event "felt upbeat as soon as you got online... You had follow-up. You had opportunities to express yourself."

### MATCHING BUYERS WITH SELLERS

One huge uncertainty of the virtual format was how it would play out in the exhibit hall.

MINES and Associates exhibited at one other virtual conference during the pandemic lockdown, which Kimlinger described as a "terrible" experience that wasn't worth the investment.

About 20 exhibitors simultaneously sat in front of a Zoom call camera to watch for attendees who would initiate a chat, then move into a private breakout session.

"It was just a weird process," she reports. "I had maybe two conversations in the course of three days where people came to me."

Given the complex nature of the behavioral health services her company offers, Kimlinger explains that virtual interactions can be challenging from the standpoint of luring in customers. "It's not like you're buying a widget on a website," she says. "It's a conversational sale."

Having access to the attendee list beforehand, along with using the conference's messaging platform for correspondence and a feature that helped match customers

with appropriate service providers, paved the way for proactive outreach that led to more meaningful conversations. "We were able to better target the communication very intentionally," she reports. A number of groups scheduled post-conference meetings.

Carabello says one of her clients, AscellaHealth, a sponsor of the virtual conference, was inundated with meeting requests to learn more about the company's specialty pharmacy management services.



Dave Wilson

### COMPELLING KEYNOTERS

SIIA Board Chairman and Windsor Strategy Partners CEO David Wilson, a SIIA member for nearly 30 years, thought Kristen Soltis Anderson, a Republican pollster, television personality and writer who previewed the presidential election, was spectacular. "I loved the way that she wouldn't rise to the bait that [SIIA CEO] Mike [Ferguson] was throwing at her," he says.

Clemente gave high marks to Robert Stevenson, a professional speaker who has been invited to many SIIA conferences over the years, for his thoughtful keynote on adjusting to the pandemic's virtual world. "We actually

## Virtual Conference

had him when we did our SIIA Future Leaders standalone event in Tampa,” he explains. “I think he does a wonderful job.”

Among the educational content that resonated most with Clemente were topics involving data and population health management and the history of SIIA, describing the latter session as “delightful” and recommending it to younger members for deeper industry context. “I thought it’d give a good appreciation for all the work that’s done to where we are now with SIIA,” he adds. Overall, he says there was no shortage of great content for brokers, TPAs, captives and stop-loss carriers.

Privy to all of the pre-conference discussions and contingency plans, Wilson describes the end result as “a virtual conference like none I’ve seen.”

He says the format change allowed SIIA to focus on educational content and

provide an opportunity for many more SIIA member firms to participate. Whereas a company with 80 people might have sent only five of them to SIIA’s national conference in the past, he says there was no such restriction with the virtual event whose presentations were later posted on SIIA’s Canoe website and could be viewed at any time.

About two years ago, SIIA began recording some of the national conference sessions and posting them on Canoe. While there was a time lag in the past, all virtual content this year was available throughout the event on a special link before migrating to Canoe. In the future, Wilson suspects more virtual sessions will be done.

Like many attendees of SIIA’s virtual conference, Clemente had already managed his expectations months in advance. “By the time May hit, it just seemed completely unrealistic that, by October, we were going to either, A, have a vaccine, or B, that it was going to be maybe some version of a hybrid, which I had no idea how they would ever pull that off,” he says.

While disappointed that he’d miss out on golf and other fun activities in Phoenix where the live event was supposed to be held, Clemente was pleased that SIIA’s virtual format still delivered on valuable educational content and all “the in-between-the-lines stuff” that facilitate business and meaningful interactions. ■

Bruce Shutan is a Portland, Oregon-based freelance writer who has closely covered the employee benefits industry for more than 30 years.

