

2018 CHSI Connections User's Workshop

AGENDA

September 26th, 27th and 28th

Tahiti Village, 7200 Las Vegas Blvd S, Las Vegas, NV 89119



Wednesday, September 26th

- 8:30am – 9:00am [Continental Breakfast](#)
- 9:00am – 10:00am [Artificial Intelligence - The Past, The Present And The "Predictable" Future](#)
[Stan Smith, CEO gradient AI](#)
The session will cover where this technology has come from, where it is today through simple examples, and where it is headed, or likely to be, in the future.
- 10:00am – 10:30am [Q&A with Stan / Networking Break](#)
Stan is going to make himself available for approximately 20 minutes after his session for a meet and greet and to answer any questions you might have.
- 10:30am – 11:00pm [CHSI Technologies Road Map Discussion](#)
A product roadmap communicates the why and what behind what a software company is building. We'll discuss CHSI's 2018 product roadmap and where we're heading with our initial thoughts for 2019.
- 11:10am – 12:00pm [Third Party IT initiatives](#)
How can you use the CHSI database to do more within your own eco system? This session will demonstrate how UBIC is currently linking their database to third party applications and the benefit that comes with a little ingenuity.
- 12:00pm – 1:00pm [Lunch](#)
We'll have lunch brought in and will eat as a group. I'm hoping we can use this time to answer questions or cover other topics not mentioned in the agenda. Of course, it's also a good time to check in at the office and go through emails and return calls.
- 1:00pm – 1:50pm [Project Lessons for Those Who Need Project Lessons](#)
Projects can get off track easily. This session intends to give life lessons on implementation management from three seasoned insure tech veterans moderated by former Digital Insurance editor, Pat Speer
- 2:00pm – 2:30pm [Networking with Fellow Attendees](#)
Time to get to know the person sitting next to you a little better. We'll use this time to introduce you to other attendees that are in your line of work and share some war stories together.
- 2:30pm – 3:00pm [Agency Portal Demonstration with Cimarron](#)
2018 saw the development of a new front-end marketing portal for agency use in providing indications, quotes and supports payments and binding.
- 3:10pm – 4:00pm [The Job for the Right Tools](#)
From milkshakes to dental paperwork to data tables, Mike talks about the goal of clear design—to identify the job that needs doing and empower you to do it. See how Connections is implementing clear design principles and get a sneak peek at future features.
- 4:10pm – 4:30pm [Customer Recognition](#)
This year, we'll be honoring a few of our customers for their contributions to helping build the best product ever!
- 5:30pm – 8:00pm [Networking Event](#)
Getting to know each other a little better, Vegas style.

Thursday, October 19th

Time	Beginner Track	Intermediate + Track	Slacker Track
8:30am	Tech Setup & Support	Tech Setup & Support	Continental Breakfast
9:00am	Database Basics	Advanced SQL	CHSI Connections Demo User Interviews
10:30am	Break	Break	Izenda Demo
10:45am	Database Basics Continued	Advanced SQL Continued	
12:00pm	Lunch	Lunch	Lunch
1:00pm		Crystal Reports	CHSI Connections Demo User Interviews
2:00pm	MS Access	Izenda Demo	
3:00pm	Networking Break	Networking Break	Networking Break
3:30pm	Database Basics Recap	Data Import Strategies	CHSI Connections Demo User Interviews
4:30pm	Blackjack Tournament	Blackjack Tournament	Blackjack Tournament
5:30pm – 8:30pm	Las Vegas Stratosphere	Las Vegas Stratosphere	Las Vegas Stratosphere

Tech Setup and Support

We'll use this time to ensure that everyone's laptops are connected to the network and able to access their Connections database. If you don't have SSMS, you can get it here. <https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017>

Database Basics

The SQL geniuses at CHSI Tech will be walking you through the basics of MS SQL. This will be an open forum, so please feel free to jump in with your questions should you have any. And, if you can contribute to a topic that might be helpful to other attendees, please do so.

Advanced SQL w/ Lab

Whether you've just learned the basics or have specific things you're trying to accomplish, we'll be taking requests or walking everyone through our prepared labs. Come with your toughest data challenges or just an open mind ready to learn!

Lunch

Same as yesterday, only with different delicious selections!

Connections Product Demo

We know that it's probably been quite a while since some of you have seen a full demo of what Connections can do. So, we'll spend some time going through the product and answering any questions that you might have. This is also a good time to throw out your feature ideas too!

Networking with Fellow Attendees

Wow! That was kinda like drinking from a fire hose. Time to chillax a bit and perhaps chat with your new compadres about what you've learned. And, perhaps, pass on some tips and tricks of your own.

Crystal Reports

We'll show you the tips and tricks we've learned over the years to create and modify reports using Crystal Report. During this session, we'll review how Connections uses Crystal Reports and how you can have access to make modifications to your own reports.

Izenda Demo

Connections has an adhoc report writing and business intelligence tool and we'd like to show you more about it. This demo is meant to be informative and to try to sell you something...

MS Access

Another powerful tool for accessing data in your Connections database is Microsoft Access. In this session, we'll show you how to connect Access to the Azure SQL database, run queries and more.

Data Import Strategies

Pushing data into Connections is a big deal for a lot of our customers. During this session we'll review best practices for importing data to ensure that it can be properly reported from later.

Black Jack Tournament

This is high stakes, no holds barred black jack. Two winners will receive fabulous prizes! Earn your chips throughout the day by asking great questions and meeting new people!

Las Vegas Stratosphere

Tallest free-standing tower in the United States? Check! Three highest thrill rides in the world? Check! Delicious cocktails and appetizers? Check and check! Oh, and you can be pushed off the top too. Not as scary as it sounds. Lee survived...

Presenter Bios



Stan Smith, CEO – gradient AI

Stan founded gradient A.I. within Milliman and spun the business out in July of 2018.

gradient A.I focuses on the application of advanced modeling techniques combined with “Big Data” to develop high impact solutions for our clients most important business challenges including Underwriting and Claim management.



Pat Speer, Principal - Speer Content Strategy & Development LLC

Pat heads Speer Content Strategy & Development LLC, an insurance thought leadership content strategy and development consulting firm. She has spent the bulk of her career delivering award-winning content covering a spectrum of processes, technologies and products that pertain to the insurance sector. The former editor-in-chief of Insurance Networking News/Digital Insurance and founder of the publication’s Women in Insurance Leadership program, Speer also previously served as a property & casualty analyst.



Steven Long, Founder and Senior Consultant for the Long Group

Steven Long is the Senior Consultant at Long Group Consultants, Inc. With a long history of working with various sizes and types of Carriers, he has forged an expertise in Workers’ Compensation Compliance Reporting and the Data Management surrounding insurance operations. In 2016, Steven and Kate Long brought leading-edge technology and a group of like-minded experts together to form Long Group Consultants.



Lee Mashore, CPO

Hi, I’m Lee, and for the past 18 years I’ve been starring in my own reality show at CHSI Technologies where I help manage a software company, spending most of the day schlepping its wares, applying this same level of witty prose to our release notes and occasionally cooking employees breakfast. I know how to use affective and effective correctly in a sentence. And, no, I haven’t lost my mind, it’s backed up to my OneDrive...



Richard Mathis, CTO

Helping bring the “Tech” to CHSI Technologies, Richard has 20 years of experience building and delivering web-based application software. He orchestrates the people keeping the engine running day in and day out, at least when he isn’t teaching advanced SQL tips to anyone willing to write a query. As the solution architect painting the big picture in how features are implemented, his background in 10 years of webcomics and more recently YouTube videos, has helped him flex his creative muscles to develop some of the more creative new features in Connections.



Colin Moulton, VP Product Development

Hailing from New York and slumming around the Midwest for years, Colin settled down in Las Vegas as Connections’ baby daddy. His fourteen years have been well spent growing Connections and trying to stay one step ahead of our customers (and Trevor). He brings over twenty years of insurance experience from both the provider and carrier side as well as over a decade of software development skill to the company. Many of you know him as our Workers’ Compensation guru, but he can also pour a mean cocktail – seriously, gives new meaning to the “free pour” shot.



Trevor Lightbound, VP Partner Services

A transplant from Canada, Trevor forces CHSI Tech to use the slogan Made in America, by North Americans. In his 7th year here He has been known to brew the perfect pot of coffee and discuss Big Brother strategy at nausea. Trevor works directly with clients so you probably already know him... and maybe even like him a little. His unique combination of leadership, insurance management and technical skills make Trevor a valued resource on each project.



Urias McCullough, Director of Implementation

Urias has been with CHSI Tech for 7 years and brings over 20 years of software development experience as well as 15 years of insurance policy management systems design and development to the table. With his experience, he is heavily involved in the product features and customer implementation details revolving around public risk and multi-line quoting, but also loves spending time pouring over badly written SQL with a critical eye. Urias hails from some backwoods town in northern California where he enjoys living amongst the waterfowl and other wildlife.



Mike Ziethlow, User Experience Architect

Mike's goal is to build products that people love. At CHSI Technologies, this means spending a lot of time on the phone with our partners, observing how they use our products, and scribbling feverishly on a notepad. He then codes prototypes of solutions and works with the development team to execute better user experiences. He comes from a consumer web development background and was the owner of 3 companies for over a decade before joining CHSI in early 2017.