Technology
Learning
PEOPLE

2018 CONNECTIONS USER'S WORKSHOP

LEARNING FROM US, LEARNING FROM EACH OTHER

EVENT LOCATION

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

EVENT DATES

September 26th, 27th, 28th 2018

CHSI
CONNECTIONS

Contents

Event **Partners**

Thank you to all of our partners who are helping to make this year's workshop the most relevant Connections insurance workshop ever!

Gradient AI

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.

Cimarron

Cimarron Insurance Company is a property and casualty insurance company. Operating in 27 states, we specialize in single employee businesses and truckers who are single employee, owner operators.

UBIC

Based in South Jordan, Utah, UBIC has become an insurance industry leader in workers' compensation.

UBIC is dedicated to meeting the needs of its agents and policyholders with a strong emphasis on providing outstanding customer service and results-oriented risk management programs.

Speer Content Strategy & Development

Pat Speer is president of Speer Content Strategy & Development LLC, a communications and content management consulting firm. She is also the former editor-in-chief of Insurance Networking New

The **Company**

Award winning CHSI Connections® incorporates CRM, underwriting, billing, claims management, analytics, broker & policyholder portals into a single platform.

Mission

Our mission is to level the playing field for small and mid-market companies by providing access to the highest quality technologies at the most affordable investment price in the marketplace.

Vision

Our vision is to be "The Leader in Hosted Insurance Management Solutions". The name CHSI was chosen to communicate the company's passion, spirit, and values for which it stands: Commitment, Honesty, Service and Innovation.

Game Changing

With a full time engineering staff and dedicated partner services team, we're disrupting and redefining Insurance technology. We strive to optimize your insurance stack of operations by leveraging our innovations.

Our **Team**

A few of the faces you'll see at the Connections User Workshop, feel free to say hi to all of the rest of the folks helping make this event possible!

LEE MASHORE

CPO
18 years of starring in the reality show that is CHSI Technologies, writing the witty prose and occassionally cooking the employee's breakfast.

RICHARD MATHIS

CTO
20 years of experience building and delivering web-based application software. He orchestrates the people keeping the engine running day in and day out.

TREVOR LIGHTBOUND

VP Partner Services
Our Canadian transplant.. His unique combination of leadership, insurance management and technical skills make Trevor a valued resource on each project.

COLIN MOULTON

VP Product Dev
20+ years of software development, known as the workers' Compensation guru and has 15+ years at CHSI

URIAS MCCULLOUGH

Director Implementation
Over 16 years of experience with insurance policy management systems. Expert in all things data from SQL to advanced analytics.

MIKE ZETLOW

User Experience Architect
Mike's goal is to build products that people love. Comes from a consumer web dev background & was the owner of 3 companies before joining CHSI.

Dedicated Team

Our team is dedicated to making better solutions for the insurance industry. We partner with our customers to make their business better, not simply doing the job but looking for ways to go beyond the job to create new opportunities and solutions to problems that haven't even been defined yet.

Wednesday   26th

Here we focus on the business of running an insurance company and technologies that can help insurance companies do more with less.

1

CONTINENTAL BREAKFAST

2

SPEAKER - STAN SMITH, CEO GRADIENT AI

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

3

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.

4

CHSI TECH 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.

5

THIRD PARTY IT INITIATIVE

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.

6

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.

7

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

8

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.

9

AGENCY PORTAL DEMONSTRATION - CIMARRON

2018 saw the development of a new front-end marketing portal for agency use in providing indications, quotes and supports payments and binding.

10

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.

11

CUSTOMER RECOGNITION

This year, we'll be honoring a few of our customers for their contributions to helping build the best product ever!

12

NETWORKING EVENT

Getting to know each other a little better, Vegas style.

Schedule

Time	Event
8:30am-9:00am	SPEAKER - STAN SMITH, CEO GRADIENT AI
9:00am-10:00am	Q&A WITH STAN/ NETWORKING BREAK
10:30am-11:00pm	CHSI TECH ROAD MAP DISCUSSION
11:10am-12:00pm	THIRD PARTY IT INITIATIVE
12:00pm-1:00pm	LUNCH
1:00pm-1:50pm	PROJECT LESSONS FOR THOSE WHO NEED PROJECT LESSONS
2:00pm-2:30pm	NETWORKING WITH FELLOW ATTENDEES
2:30pm-3:00pm	AGENCY PORTAL DEMONSTRATION - CIMARRON
3:10pm-4:00pm	THE JOB FOR THE RIGHT TOOLS
4:10pm-4:30pm	CUSTOMER RECOGNITION
5:30pm-8:00pm	NETWORKING EVENT

Thursday   27th

We've gone over the What and Who of running an insurance company, now we focus on the How, teaching, doing workshops, sharing samples, and working through YOUR problems.

1

TECH SETUP & 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://goo.gl/

2

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.

3

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!

4

LUNCH
Same as yesterday, only with different delicious selections!

5

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!

6

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.

7

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.

8

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…

9

MICROSOFT 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.

10

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.

11

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!

12

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…

Schedule

Time	Beginner	Intermediate	Slacker
8:30am-9:00am	Tech Setup & Support	Tech Setup & Support	Continental Breakfast
9:00am-10:00am	Database Basics	Advanced SQL	
10:30am-11:00pm	Break	Break	Izenda Demo
11:10am-12:00pm	Database Basics Continued	Advanced SQL Continued	
12:00pm-1:00pm	Lunch		
1:00pm-1:50pm		Crystal Reports	CHSI Connections User Interviews
2:00pm-2:30pm	MS Access	Izenda Demo	
2:30pm-3:00pm	Networking Break		
3:10pm-4:00pm	Database Basics Recap	Data Import Strategies	CHSI Connections User Interview
4:10pm-4:30pm	Blackjack Tournament		
5:30pm-8:00pm	Las Vegas Stratosphere		