



# CUSTOMER ENGAGEMENT SUMMIT **HEALTHCARE**

 **OCTOBER 29, 2019**  
**BOSTON, MA**



## Agenda | Customer Engagement Summit: Healthcare | October 29

9 :00 AM	<b>Registration and Breakfast</b>
10:00 AM	<p><b>Welcome &amp; Introduction</b></p> <p><b>Kelli Bravo</b> <i>Vice President, Healthcare and Life Sciences, Pegasystems</i></p> <p><b>Susan Taylor</b> <i>Vice President of Payer Core Admin, Pegasystems</i></p>
10:15 AM	<p><b>The Heart of Digital Transformation</b></p> <p><b>Alan Trefler</b> <i>Founder and CEO, Pegasystems</i></p>
10:45 AM	<p><b>Social Determinants and Health-Driven Innovative Benefit Designs</b></p> <p><i>Consumerism, operationalizing Social Determinants of Health, and employer sponsored health plans. These seemingly disparate industry trends are creating</i></p>

	<p><i>unique opportunities for benefit design that can unlock value and deliver new levels of alignment. Dr. Goldberg will discuss these trends and how employers and payers are responding.</i></p> <p><b>Steven E. Goldberg, MD, MBA</b>  <i>VP, Medical Affairs, Population Health and Chief Health Officer, Health &amp; Wellness, Quest Diagnostics</i></p>
11:15 AM	<p><b>Driving Proactive Service and Responsive Benefits to Thrill Members</b></p> <p><b>Jonathan Kelly</b>  <i>Director, Solutions Consulting - Healthcare, Pegasystems</i></p>
11:45 AM	<p><b>Engagement Panel</b></p> <p><b>Consumerism in healthcare: More than consumer choice and impacting engagement, operations, and profitability across healthcare and life sciences organizations</b></p> <p><i>Organizations delivering on consumerism are creating integrated offerings that address a real customer need, transform experience, and unlock value. For HC and LS organizations to transform, they need to look from a future consumer-centric experience back to today and create a map for transformation that capitalizes on opportunities uncovered. Our panel looks at the consumer-centric future through engagement, customer satisfaction, and responsive benefit administration to share lessons learned and ideas to inform transformation.</i></p> <p><b>Fabrice Bocquillon</b>  <i>VP, Information Technology &amp; Solutions, Integrated Patient Care &amp; Market Access, Sanofi</i></p> <p><b>Steve Chambers</b>  <i>VP Contact Center, Sutter Health</i></p> <p><b>Tom Russell</b>  <i>Director, Claims and Benefits Product Strategy, NASCO</i></p> <p><b>Norman Wright</b>  <i>Executive Vice President, Chief Customer Officer, Optum</i></p> <p><i>Moderated by:</i>  <b>Kelli Bravo</b>  <i>Vice President, Healthcare and Life Sciences, Pegasystems</i></p>

12:30 PM	Networking Lunch, Tech Pavilion, and Partner Spotlight Talks			
1 :45 PM – 3 :30 PM	Industry Breakouts			
	Payer Engagement and CRM	Payer Core Admin	Life Sciences	Provider
	<i>Hear success stories from healthcare payers who are leveraging digital automation, proactive and personalized service and 1:1 member engagement to transcend the pressures of consumerism, consolidation, and the explosion of the Medicare market.</i>	<i>Industry disruption is forcing payers to rapidly address gaps in their core administration systems. Hear from payers who are successfully modernizing their operations to gain efficiency, transparency and the ability to quickly capitalize on new market opportunities.</i>	<i>Fulfilling the promise of personalized medicine requires frictionless processes and engaged patients. Find out how Life Sciences leaders are responding to major industry transformation and deploying technology to achieve better value-based clinical outcomes.</i>	<i>Learn from providers about care management transformation and the impact of patient engagement programs designed to help patients through difficult journeys, reduce readmissions, improve health outcomes and build loyalty.</i>
	1:45 PM – 2:15 PM			
	<b>Healthcare Transformation in the Birthplace of Managed Care</b>  Take a peek at Blue Shield of California's (BSC) current digital transformation effort, including the revitalization of their customer service center with a focus on improved member engagement and proactive customer service. Part of this vision is to provide better access to information with seamless integration for the agents who serve their members by connecting the systems such as claims and data needed to create a complete	<b>Product Modernization Delivers Enterprise Value</b>  Employer groups, dissatisfied with the ability of existing offerings to help them and their employees reduce total cost of health, are shopping for new products in larger numbers (62%) and changing carriers at a growing rate. Ability to rapidly respond to customer demands with personalized healthcare benefit and product design has emerged as key capabilities in insurance sales.	<b>Empathy &amp; Hope – the two pillars of next-gen patient engagement</b>  Celgene produces several products to treat patients with life-threatening diseases. But, these products carry serious safety concerns. As a result, Healthcare Authorities around the globe require Risk Management programs to help ensure the benefits of these medications outweigh the risks. Patients, prescribers, pharmacists and Celgene all have tasks to perform in complying with these Risk Management programs.	<b>Delivering personalized care while reducing care gaps for high-risk Medicaid members</b>  Managing care coordination is not just important for medical care. Delta Dental has built a care coordination program using Pega Care Management to drive improved care for its high-risk Medicaid Members. Delta Dental's goal was to better coordinate personalized care across dental and medical care for their fragile members. Trying to manage care manually or via spreadsheets was not efficient or

view of the member's journey. Hear about BSC's mission and objectives for their transformation and how Pega Infinity, Customer Service for

Healthcare and decisioning are being implemented to meet those objectives.

Learn about BSC's tactical plans for using this CX solution to:

- Transform their internal operations
- Re-imagine their member and provider relationships in a digital ecosystem
- Drive better health and business outcomes

**Carla Dailey**

*Senior Director of Business Planning & Strategy, Blue Shield of California*

In response, Health Alliance Plan (HAP), the insurance arm of leader Henry Ford Health System, utilized Pega's Product Composer System (PCS) in conjunction with the Sales Automation for Healthcare (SAHC) and Customer Service for Healthcare (CSHC) to create an integrated solution which manages the product lifecycle across the enterprise. Features of the solution include ability to handle multiple product lines, generate product documentation (e.g. SBC), load benefit data into the claims system, allowing them to deliver true member-centric service.

**Donald Evans**

*Director, Information Technology - Customer Service, Health Alliance Plan*

Technology serves as a critical enabler for these programs.

In this session, learn how Celgene is:

- Leading the charge in creating global solutions for the safety of their patients
- Reducing the burden of prescribers and pharmacies using their products to treat patients
- Leveraging the PEGA platform to create centralized global solutions to serve their healthcare communities

**Kevin White**

*Global Executive Director, Celgene*

effective and left the potential for gaps in care. Reducing gaps in care and providing better coordination to improve patient relationships are the key drivers behind their program.

From this session you'll learn, how Delta Dental is:

- Bringing care back to care management for its high-risk Medicaid members
- Delivering personalized care while reducing care gaps
- Improving patient relationships and business and health outcomes

**Michael Dunbar**

*Manager Applications Development, Conversion & Integration, Delta Dental*

**Kintu Gupta**

*Technical Specialist, Conversion & Integration, Delta Dental*

**2:20 PM – 2:50 PM**

**How Express Scripts continues to drive innovation and leadership with digital customer engagement**

Express Scripts, Inc. (ESI), with over 100M members, will provide a view into key market leading offerings for clinical prior authorization, Sales CRM, and care management. Powered by Pega, this unique digital customer engagement suite, keeps the patient at the center of everything for ESI.

**Designing from the Human Point of View**

**Matthew Akromis**

*Account Executive, Pegasystems*

**Chris Mauer**

*Vice President, Client Innovation, Pegasystems*

**Chiranit Prateepasen**, *Industry Application UX Design Manager, Pegasystems*

**Scaling Pega to do what could not be done**

Scaling Pega allows Sanofi to bring digitalization to Patient Support Teams and Patients in small markets that would not warrant the kind of technology investment required. It is not as complicated as you think.

Learn how we did it and what we wish we knew before we started. Find out what is next as Sanofi continues to scale

**Sutter Health's Vision of Transforming Healthcare**

Sutter Shared Services (S3) plays a critical role in Sutter Health's vision of transforming healthcare and finding innovative ways to deliver high-quality and affordable healthcare for patients. S3 has first-hand knowledge of the pressures healthcare systems face to save on cost while still providing a seamless patient journey. To achieve affordability objectives and improve

In this session you will:

- Learn how low-code development and agile, rapid delivery brought real-time, web self-service for medical and pharmaceutical authorizations
- Hear how ESI dramatically decreased turnaround times for patients and physicians
- See what sophisticated customer service looks like for 100M members

**Bijal Parekh**

*Senior Director Technology, Express Scripts*

**Raman Kaur**

*Director of Coverage Review, Express Scripts*

**Rob Seyss**

*Senior Director of Technology, Specialty Pharmacy & Call Center Systems, Express Scripts*

*Moderated by:*

**Sarah Franchetti**

*Director Healthcare Industry Principal, Pegasystems*

Pega to capitalize on the pharmaceutical growth in emerging markets.

**Kathleen Macke**

*IT Director, Patient Services Program Owner, Sanofi*

the patient journey, S3 has focused on centralizing its contact centers—in multiple locations and two states—to continue to support the 24 hospital campuses across the Sutter Health network, as well as external clients. Earlier this year, S3 elected to invest in a new technology solution to support a large Universal Agent project in its contact centers. The project aims to simplify complex workflows and help patient service representatives overcome challenges in provider scheduling preferences. This presentation will discuss how S3 plans to implement PEGA to address the cost pressures that force contact center centralization and the complexity of provider scheduling rules.

**Steve Chambers**

*VP Contact Center, Sutter Health*

**3:00 PM – 3:30PM**

**The New Era of Healthcare: Transformation as a Result of Payer/Provider Convergence**

With the rapid changes that are happening in the healthcare industry which are bringing together payers and providers in unique ways each day, what are we doing to innovate, prepare, and transform as a result of convergence between payers and providers?

**Claims Process Automation**

Claims can no longer be viewed as transactions, they are experiences that can strengthen or challenge a relationship. Existing systems of records with the lack of interoperability across the healthcare ecosystem, will not suffice in the today's age of the customer. Join us to hear how HealthNow has evolved their claim operations from Claim Repair to

**Partnering for Innovation in a Regulated Environment**

Family-owned since it was established in 1885, Boehringer Ingelheim is one of the pharmaceutical industry's top 20 companies. Some 50,000 employees create value through innovation daily for the three business areas human pharmaceuticals, animal health and biopharmaceuticals.

**The New Era of Healthcare: Transformation as a Result of Payer/Provider Convergence**

With the rapid changes that are happening in the healthcare industry which are bringing together payers and providers in unique ways each day, what are we doing to innovate, prepare, and transform as a result of convergence between payers and providers?

**Barbara Coughlin, DNP, MBA, RN**  
*Assistant Vice President Care Management Operations, HCA Healthcare*

**Paul E. Jones**  
*Vice President, Card-to-Care, HM Health Solutions*

**Lee Green**  
*Chief Architect, Blue Cross Blue Shield of Massachusetts*

*Moderated by:*  
**Carol Everhart, RN, MS**  
*Director, Healthcare Industry Principal, Pegasystems*

**Bill Marshall,**  
*Director, Healthcare Industry Principal, Pegasystems*

implementation of robotics, in order to improve their operations and overall internal as well external experience.

**Melissa A. DeBoth**  
*Enterprise Architect, HealthNow New York Inc.*

**Jeanette Komasa**  
*Systems Analyst – Application Development, HealthNow New York Inc.*

In this session, learn how BI:

- Used Pega to meet a compliance need for the Quality Auditing team
- Leveraged the Pega platform to create multiple applications for the Animal Health business
- Used Agile methodology to roll out a global GxP relevant application

**Elie Laham**  
*IS Business Consultant II, IT RDM Quality Management, Boehringer Ingelheim*

**Barbara Coughlin, DNP, MBA, RN**  
*Assistant Vice President Care Management Operations, HCA Healthcare*

**Paul E. Jones**  
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**Carol Everhart, RN, MS**  
*Director, Healthcare Industry Principal, Pegasystems*

**Bill Marshall**  
*Director, Healthcare Industry Principal, Pegasystems*

## Speakers | Customer Engagement Summit: Healthcare | October 29



**Fabrice Bocquillon**

*VP, Information Technology & Solutions,  
Integrated Patient Care & Market Access, Sanofi*

Fabrice brings a mindset of nimble and collaborative innovation; for the benefit of improved care for patients and caregivers, making Sanofi a successful digital company. Mr. Bocquillon is currently the ITS Head Sanofi Integrated Patient Care and Market Access. The solution center delivers Sanofi solutions for patient engagement; including portals and digital mobile application, but also global pricing and revenue management tools and analytics.

Prior to his time at Sanofi, Mr. Bocquillon was the ITS Head Genzyme Mergers & Acquisitions. Global IT leader for the integration of Bioverativ and the creation of the new Rare Blood Disorder Franchise of specialty care.



**Barbara Coughlin, DNP, MBA, RN**

*Assistant Vice President Care Management  
Operations, HCA Healthcare*

Barbara Coughlin is the Assistant Vice President of Care Management Enterprise Operations for HCA Healthcare. Barbara is leading the enterprise development of a Care Management strategy to provide patient navigation across HCA's enterprise of inpatient and ambulatory settings. Previously at HCA, Barbara served as the Vice President for Quality and Government/Payer Initiatives. In this role, she provided oversight for 5,000+ physicians and advanced practice providers in more than 1,200 ambulatory practice locations.

Prior to joining HCA, Barbara has served in multiple leadership roles with QRx Medical Management/Questcare Partners, HCA Clinical Services Group, and Ernst & Young, LLP. Barbara has more than 28 years of experience in healthcare focusing on emergency medicine, ambulatory care, quality and risk, and process and operational improvement.

Barbara earned her Doctor of Nursing Practice from Texas Christian University, her Master of Business Administration from the University of Cincinnati, and her Bachelor of Science in Nursing from The University of Texas Medical Branch in Galveston.



**Carla Dailey**

*Senior Director of Business Planning & Strategy,  
Blue Shield of California*

Carla is a passionate leader in transforming healthcare and has led many strategic initiatives to drive process improvements and efficiencies across operations. Her background in the manufacturing industry with companies such as Apple Inc., The Clorox Company and Levi Strauss & Co. gives her an edge for understanding the “art of possible” in healthcare and operations. For the past 12 years, she delivered platform improvements for Healthnet, Anthem, and now Blue Shield of California (BSC) by implementing emerging technologies and capabilities across front and back office. In her role at BSC, Carla oversees the business system analyst requirements and community of practice efforts and is currently the business driver of the Customer Experience Unified Desktop platform implementation.



**Steve Chambers**

*VP Contact Center, Sutter Health*

As the Vice President of Contact Center, Steve Chambers oversees all operations and business development opportunities for the Patient Service Center, a 24/7 contact center. He was previously the Senior Director of Operations for Patient Access Solutions, and brings with him almost 20 years of contact center experience. Steve has also held roles in process improvement, project management, information services, and consulting in the satellite, telecommunications, pharmacy, and healthcare industries, giving him a wealth of experience in expanding patient access and delivering a superior patient experience. Steve earned his Bachelor's degree in Business from Utah State University and an MBA with an emphasis in Technology Management from Walden University in Minneapolis.



**Melissa A. DeBoth**

*Enterprise Architect, HealthNow New York Inc.*

Melissa began her career at HealthNow in 2004 as a supervisor of Enrollment and Billing and has held many positions within management and later advanced to her current position of Enterprise Architect. Melissa is responsible for establishing trusted advisor relationships across both business and technology domains. Her responsibilities include the realization of business strategy through technology planning alignment and establishing proof of concepts in support of solution delivery. Melissa was behind implementing PEGA robotics at HealthNow, thanks to her extensive background in health care and the strategic vision of her business partners. She also led the effort to support remediation of multiple complex systems toward the ICD-10-CM diagnosis and procedural implementation. As a professional certified coder, she was able to not only identify impacts to the business but deliver solutions using technology. Melissa is an adjunct professor in medical coding at Bryant & Stratton College. She resides in Buffalo with her husband.



**Michael Dunbar**

*Manager Applications Development,  
Conversion & Integration, Delta Dental*

Michael is an experienced team manager and leader of IT software development in cross-functional settings. 18+ years health insurance industry experience. Utilizing an array of enterprise, cloud & web software development technology and data delivery platforms.

Currently, Michael plays a key role in implementation of Medicaid technical on-boarding projects at Delta Dental of California. Michael loves to travel, dogs and enjoys dinners and outings with friends.

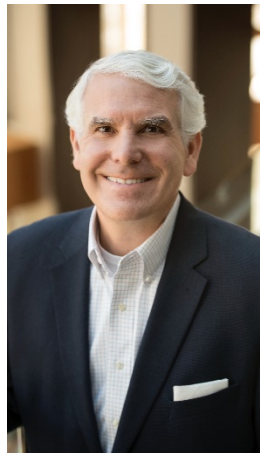


**Donald Evans**

*Director, Information Technology - Customer Service, Health Alliance Plan*

Don Evans is an IT Director at Health Alliance Plan (HAP) with responsibility for development and support of applications built on the Pega Systems platform. Sixty percent of HAP internal users have at least one Pega application on their desktop. The two largest applications are the Customer Service CRM, utilized by the Call Center and its supporting organizations, and the Product Lifecycle Management application utilized by Product Development, Underwriting, and Sales.

Prior to HAP, Don worked for 25 years in the IT Consulting industry with a primary focus on systems integration architectures in the Financial Services sector. Don graduated from the University of Michigan with MBA, MSE(I&OE), and BSEE degrees. Following his undergraduate work, Don served as an officer aboard a US Navy Submarine.



**Steven E. Goldberg, MD, MBA**

*VP Medical Affairs, Population Health and Chief Health Officer, Health & Wellness, Quest Diagnostics*

Steven ("Dr. G") Goldberg, MD, MBA, is VP, Medical Affairs, Population Health and Chief Health Officer, Health & Wellness, for Quest Diagnostics. His objectives are to drive innovation and value in employer population health and precision medicine. Quest Diagnostics Medical Affairs provides scientific support for product development and post market support to both internal teams and external customers. Our Employee Health Benefits team is methodically improving member healthcare experience, clinical outcomes and bending cost trends for our employees and their families. Our Health & Wellness team partners with employers to implement innovative workplace screening and population health solutions. Prior to joining Quest in May 2016, he served as SVP, Chief Medical Officer at WellCare Health Plans, a provider of government-sponsored managed care services. He has previously served in executive medical management roles with Aetna, Centene, Express Scripts, Humana and Excellus BCBS. He received his undergraduate degree from Georgetown University, Medical Degree from Jefferson Medical College, completed Family Medicine residency in Upstate NY, an MBA at Binghamton, University. Dr. Goldberg is board certified in Family Medicine and has part-time practice in Kentucky.



**Kintu Gupta**

*Technical Specialist, Conversion & Integration,  
Delta Dental*

Kintu is a Technical Leader with several years of IT industry experience managing global software delivery utilizing traditional data platforms, Big Data Enterprise tools and Cloud technologies. Kintu has healthcare industry exposure in both provider and payer domains, working with large organizations like Delta Dental, United Health Care, TriZetto and Omnicare. He received his MBA in Product Management and Strategy with Honors from Arizona State University. Kintu is currently helping with Medicaid implementations for State clients and other projects at Delta Dental.

On personal side, Kintu loves to spend time learning Indian classical music and travel with family.



**Paul E. Jones**

*Vice president, Card-to-Care, HM Health  
Solutions*

Paul E. Jones holds the position of vice president, Card-to-Care Value Stream, at HM Health Solutions, a member of the Highmark Health family of companies. HM Health Solutions provides proven business processes, expert knowledge and an integrated end to end platform to Highmark Inc. and other unaffiliated health plans.

Mr. Jones specializes in realizing strategic business value through innovating and improving technology, process and culture. Paul is a Conner Partners trained organizational change practitioner, and a Juran Institute certified Six Sigma Black Belt.

Paul and his teams strive, "To radically improve the Healthcare and the lives of members, patients and providers by strategically delivering market leading solutions in the Clinical and Provider spaces."



**Raman Kaur**

*Director of Coverage Review, Express Scripts*

Raman Kaur, a proficient leader with extensive experience in the healthcare industry, has been with Express Scripts, Inc. (ESI) for nearly three years as the director of coverage review engineering team. Prior to joining ESI, she worked with large organizations such as Hackensack University Medical Center, Cleveland Clinic, Michigan State University, and Trinity Health in a variety of roles - healthcare practitioner, researcher, and consultant. Similarly, Raman has a unique combination of skills and knowledge, including: Pega technologies, UI/UX design, Agile methodologies, prior authorization/utilization management, strategic perspective and disruptive thinking. Additionally, she is a published author and was recently awarded as the employee of the quarter at Express Scripts for her valuable contributions towards innovative technology solutions offered to their members and patients.



**Jeanette Komasa**

*Systems Analyst – Application Development,  
HealthNow New York Inc.*

Jeanette began her career at HealthNow in 2011 as corporate claims supervisor and later advanced to the role of corporate claims manager. She focused on enhancing business processes to increase the speed and accuracy of claims adjudication and became motivated to learn more about the PEGA application and how it could transform daily operations. She then accepted a position as a systems analyst in the Information Technology department, allowing her to bridge the gap between Development and Operations to solve complex business problems. Most recently, Jeanette partnered with the Corporate Claims team to lead the transformation of claims processing using robotic automation. She graduated from Buffalo State College with a bachelor's degree in psychology and has more than 15 years of experience in the insurance industry.



**Elie Laham**

*IS Business Consultant II, IT RDM Quality Management, Boehringer Ingelheim*

Elie Laham is an IS Business Consultant for the Quality Management team. My focus is to work with the business within BI to help them achieve their goals, which include maintaining compliant applications and processes along with coming up with new ideas to realize efficiencies where it makes sense. I have been with BI for a total of 9 years working in various areas within the company. Prior to BI, I worked for Swiss Re for 7 years primarily focusing on Electronic Document Management and supporting the business to improve and enhance their processes. I have a Bachelor of Science in Medical Technology and a Master's Degree in Technology Management.



**Kathleen Macke**

*IT Director, Patient Services Program Owner, Sanofi*

Kathleen Macke is a global IT director with in-depth knowledge of the healthcare ecosystem and a passion to make it better. At Sanofi, Kathleen is responsible for governance, strategic alignment and financial management for patient support, care coordination and digital health applications impacting patients in over 10 countries. Prior to joining the pharmaceutical industry, Kathleen was a Relationship Manager at a Blue Cross Blue Shield (BCBS), where her affinity for healthcare was born. There she was responsible for the delegation of services to external vendors with the goal of reducing costs. A pivotal moment in Kathleen's career was when she worked on a project to support patients who had a near death experience rebuild their lives. Free counselling and life coaching was given to these patients and cost savings was realized by the reduction of stress, anxiety and re-hospitalizations. Kathleen, a New Jersey native, graduated from Bethel University in Minnesota with a degree in Computer Science. And when she isn't chasing around her three small children, she is making things better through do-it-yourself projects.



**Bijal Parekh**

*Senior Director Technology, Express Scripts*

Bijal is a key leader driving large scale software engineering teams in fully Agile/Scrum development environments. He has been with Express Scripts, Inc. (ESI) since 2005, currently heading their entire Prior Authorization & Sales CRM portfolio of solutions. At the center of multiple mergers, Bijal has led several replatforming efforts, is a thought leader in business process management (BPM), spearheaded a massive Prior Authorization replatforming initiative, and has presented at many conferences. A technologist for over 20 years, he began his career as a software engineer and analyst at Exchange Applications and United Parcel Service.



**Rob Seyss**

*Sr. Director of Technology,  
Specialty Pharmacy & Call Center Systems,  
Express Scripts*

Rob has 26 years' experience directing cross-functional teams of technical experts to analyze, pattern, and implement software & infrastructure improvements. He is a recognized leader in project planning, scheduling, prioritization, contingency & risk planning, work assignments, and defining scope for enterprise information systems projects - particularly focused on high return on investment benefits, commencing with phased-in deliverables. Rob has a track record of success in influencing cross-functional solutions, improving the efficiency of Pharmacy & Call Center Operations and business led technology, while growing the careers of the team members. He is a trusted advisor to Senior Directors and VPs across Operations, Technology, and Infrastructure/Architecture with transparency, accountability, and quality.



**Kevin White**

*Global Executive Director, Celgene*

Kevin White is the Executive Director of Celgene's Global Risk Management Technology function focused on strategy, innovation, and leadership of global risk management systems. Kevin is responsible for building and supporting risk management technology solutions that further enable diverse risk management programs for multiple products across global geographies operating within varying business models. The technology solutions focus on ensuring patient safety while reducing stakeholder burden and enhancing stakeholder engagement. Kevin has been with Celgene for over ten years. Prior to Celgene, Kevin served as Vice President of Technology for the U.S. business of a large pharmaceutical company and Vice President for Global Information Technology at a large biopharmaceutical company. Kevin began his career in management consulting serving as a Partner at KPMG Peat Marwick and Principal at McKinsey & Co. Kevin has an undergraduate degree and MBA from Lehigh University and is a Certified Public Accountant.



**Norman Wright**

*Executive Vice President, Chief Customer Officer, Optum*

As executive vice president and chief customer officer at Optum, Norman is responsible for improving quality, service and NPS performance across all customer interactions and channels. Previously, Norman was responsible for leading global operations across Optum, delivering solutions grounded in affordability, global scale and quality.

Prior to joining Optum in 2013, Norman was the managing director, Client Experience, for Citigroup's Consumer Operations in North America. Wright was also a partner with the consulting firm Accenture, where he led a practice in call center transformation for the financial services and retail industries. Before Accenture, he led customer care at Home Shopping Network. Norman also managed call center operations and technology at Fidelity Investments, GE Capital and Chase Manhattan Bank.

Norman has a BA in political science from Swarthmore College. He currently serves on the United Health Foundation Board and Charitable Giving Committee



**Alan Trefler**

*Founder and CEO, Pegasystems*

In a three-decade career, Alan Trefler has been a visionary leader, a technology change-agent, an innovative philanthropist, and a trusted advisor to business executives around the world.

Alan's unique technology vision and relentless focus on customer success is changing the way many of the world's leading enterprises engage with their customers today. His life's work has been to design a platform for living applications that business people can evolve dynamically to manage the constant disruption and change in today's customer-centric economy.

Alan founded Pegasystems in 1983 and has built the company into an \$841 million provider of strategic applications with nearly 4,500 employees in 30 global offices.

Alan's industry recognition includes The American Business Award's "Software CEO of the Year," the Massachusetts Technology Leadership Council's "Public Company CEO of the Year," and the Babson College "Academy of Distinguished Entrepreneurs". He frequently presents to international business and technology audiences at industry conferences and has consulted extensively in the use of advanced technology, the future of software, and customer engagement. In 2017, Alan was appointed to the World Economic Forum's IT Steering Committee.



**Kelli L. Bravo**

*Vice President, Healthcare and Life Sciences,  
Pegasystems*

Kelli Bravo is the Vice President, Healthcare and Life Sciences at Pega, where she leads the go-to-market strategy for their healthcare and life sciences engagement, services, and digital automation solutions. She has over 15 years of customer-focused product, business development, and marketing experience in high tech and healthcare companies. Prior to Pega, Kelli was the Vice President, Product Marketing at Casenet, a Centene company, where she led the go-to-market strategy for the enterprise care management business. She was also the Assistant Vice President of Product Marketing at McKesson, where she successfully managed the marketing strategy for the InterQual, Clear Coverage, and Advanced Diagnostics businesses. Kelli has previously held executive management positions at Microsoft, Epocrates, and athenahealth, where she was responsible for evolving the marketing and operations, public relations, demand generation, and product marketing strategies. She has an MBA and an MS in Manufacturing Systems Engineering from Stanford University.



**Susan Taylor**

*Vice President of Payer Core Admin,  
Pegasystems*

Susan Taylor is the Vice President of Payer Core Admin for Pegasystems, where she leads the company's healthcare core administration market vision and strategy. A recognized healthcare thought leader, Susan works closely with industry analysts and is a frequent presenter at global industry events on subjects including claims administration, medical management and health outcomes, financial relationship management in healthcare, and customer journey best practices. Susan has more than twenty years of experience spanning payer, provider, and medical device organizations, and her viewpoints have been featured in publications including Becker's Hospital Review, InformationWeek, and Tech Target.