

2019 DMEC ANNUAL CONFERENCE
WASHINGTON, D.C. | AUGUST 5-8

Quick Dive

How To Effectively Communicate With Your C-Suite

- Sandy Callahan, CEO, ReedGroup
- Kevin Curry, CRO, ReedGroup



PRESENTERS



Sandy Callahan is ReedGroup's CEO and a SVP at Guardian Life Insurance Company. A veteran insurance industry leader, Sandy has extensive absence and disability experience along with group benefits expertise spanning operational and financial management, talent development, operations, and customer satisfaction. She has successfully designed and launched dynamic business models that have challenged industry norms.

Most recently, Sandy was with The Hartford where she was Senior Vice President for Group Insurance Operations responsible for Aetna's integration following the company's acquisition, for which she played an instrumental role in facilitating. Prior to that she was president of Aetna's Group Insurance business, leading nearly 2,000 employees and driving the strategic vision for the \$2.2B product portfolio.

Sandy and her husband of 38 years have three children and one granddaughter.



Kevin Curry is ReedGroup's CRO, and directs business strategy, technology innovation, overall performance, and marketing. His primary focus is to drive company growth through revenue generation and retention, and to oversee alignment across all revenue-generating teams, including Sales, Marketing and MD/Guidelines. Kevin is a 20-year veteran of the Absence Management industry. Prior to ReedGroup, Kevin served in senior positions for Mercer's Total Health Management practice, where he partnered with large employers to reduce costs, significantly improve absence management productivity, and meet specific and measurable objectives.

Kevin is a well-regarded and respected industry expert, and is sought after to speak at industry events. Kevin served for many years on the board of the Integrated Benefits Institute (IBI), and currently serves as the Vice Chairman on the board of the Disability Management Employer Coalition (DMEC).



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LEARNING OBJECTIVES

1. To understand what your CEO is thinking during a business case evaluation
2. To learn ways to prepare and present your business case
3. To remember the do's and don'ts



Tuesday Concurrent Session E2

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BEFORE THE CEO PRESENTATION

- Seek alignment with stakeholders to get buy-in prior to the meeting
- Avoid surprises: test your presentation with peers before presenting to anticipate questions, close content gaps, and be prepared with thoughtful answers
- Ask CFO for sign-off prior to meeting!
- Have advocates in the room to feed you positive energy
- Send the deck to attendees prior to the meeting allowing for time to review



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THE LENS: WHAT THE CEO IS THINKING

During the presentation, your CEO and C-Suite, filter your case against:

1. Strategic Objectives: immediate and projected for the next three years.
2. Financials: How does this request reduce expenses? Investment cost? Revenue potential?
3. People: Who is affected &/or involved? How does this affect the consumer or employee experience?
4. Operations: What part of the organization will this affect? And, how?



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PRESENTING YOUR CASE

- Start with the bottom line; the financial investment is the first thing the CEO/C-Suite is thinking about.
 - If we do A, it will generate B in sales, lower expenses and deliver C% rate of return for a present value earnings of D.
 - Some presentations get off-track and time runs out before the financial information can be discussed.
- Next review the cost-benefit analysis
- Then present the strategy and proposed execution plan
- Include a risk analysis of not making the investment



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RESILIENCY

Get past "no"

- Simply; not every request can be a "yes"
- Your case might not fit the current priorities
- Present again, when the timing is better or you've honed the case objectives or investment costs



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DO'S AND DON'TS

<p>DO</p> <ul style="list-style-type: none">• Send the deck the day prior• Have allies in the meeting• Check your math• Be confident and passionate• Rehearse• Remember timing is everything<ul style="list-style-type: none">- Humbly accept a no or yes• Have a plan on how the CEO/C-Suite can participate	<p>DON'TS</p> <ul style="list-style-type: none">• Be afraid to agree to disagree• Don't demand a decision• Present an unnecessarily long deck – keep the conversation high level
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QUESTIONS?


