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LEAD. INNOVATE. BUILD COMMUNITY.

| 3<sup>rd</sup> and 4<sup>th</sup> compilation of segments with educational bullets to support |



PRESENTED BY FOUNDERS:

AMY SOTO

LUIS SOTO

4 Fundamental Pillars:

The Broker | Third Party Administrator | Managed-Care | Technology

Their role in today's risk and what proactive measures should be instituted.

**RISK LEADER'S ROUNDTABLE:**

**AMANDA WALTON**

IL SAFETY | RISK MANAGER

**WILL HALL**

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IL SENIOR PARTNER , NATIONAL ACCOUNT EXECUTIVE

**GUILLERMO CARDONA**

FL PRESIDENT | CEO OF TECHNOLOGY CONSULTING COMPANY

Amanda Walton | [awalton@jsginc.com](mailto:awalton@jsginc.com)



Amanda's risk experience spans the course of 15 years. She started as a claims adjuster and quickly pursued a career in risk management. She currently manages a full-service staffing and recruiting firm with nationwide service capabilities. Headquartered in the greater Chicago metropolitan area, they specialize in Aerospace, Aviation, Engineering, IT, Healthcare, Finance & Technical fields to name a few.

Will Hall | [Will.Hall@partnerspersonnel.com](mailto:Will.Hall@partnerspersonnel.com)



Will Hall is a Risk Manager for a national corporate holdings firm that specializes in contingent labor force solutions that include light industrial staffing, governmental contract labor, energy, & telecommunications. He has worked a total of 20 years' in the staffing industry with 12 of those years in the risk management realm. An innovative thinker for a modern world filled with risks.

Tania Matulewicz | [tania.matulewicz@vallartasupermarkets.com](mailto:tania.matulewicz@vallartasupermarkets.com)



Tania's expertise ranges from senior claims examiner to risk manager of a grocery/retail chain. Her career has stood the test of time and she can report a succession of 20 years of workers' compensation experience. Through her career journey under the TPA, Public Agency and Employer sector, she has become an expert in complex litigation and catastrophic complex claims.

Liz Walker | [lizmarie17@gmail.com](mailto:lizmarie17@gmail.com)



Risk and Insurance thought leader and former defense litigator bringing 18 years of legal and insurance experience, an entrepreneurial mindset, and a guiding philosophy that progress is achieved through partnership, diversity of thought and the strategic use of technology.

Cheryl Svec | [Cheryl.svec@usi.com](mailto:Cheryl.svec@usi.com)



Cheryl has more than 26 years of experience in the insurance industry specializing in workers' compensation claims management. Prior to joining the broker side, Cheryl worked as the workers' compensation manager for a rapidly expanding home improvement retail chain and was in charge of the nationwide work comp program for over 750 retail stores and three distribution centers.



## EXPERT COLLABORATORS:

**Steve Adamjee | [steve.adamjee@usi.com](mailto:steve.adamjee@usi.com)**



Steve is responsible for building and serving a robust clientele by consistently delivering financially impactful Risk & Insurance Solutions that exceed client expectations. Steve's technical areas of expertise include complex property and casualty solutions, Financial Risk Management and Claims Analytics. He specializes in Alternative Risk Transfer solutions, large property underwriting and M & A Risk Advisory and Transaction Liability products.

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Currently the Vice President of Claims for a national TPA, Michele's career has spanned over thirty years' experience in the management of claims and risk working with carriers, TPAs, and as a national risk manager in the private sector. In her current role, she oversees a national multiline claims team focusing on quality, supportive technology, and improved outcomes.

**Beau Spreck | [bspreck@EagleOneCMS.com](mailto:bspreck@EagleOneCMS.com)**



Beau Spreck's body of work starts 10 years ago when he began taking on the reins of his family's nurse case management company. He is focused on working with risk professionals to identify program trends and helps design customized managed care solutions. He is dedicated to increasing the quality of care delivered to his patients, while reducing claim costs and increasing bottom line revenues.

**Guillermo Cardona | [gcardona@alturatekconsulting.com](mailto:gcardona@alturatekconsulting.com)**



Guillermo Cardona is the President/CEO of a technology consulting group, a Microsoft Partner, and digital transformation consulting company. Guillermo has been working in the IT industry for over 25 years. As of the last 15 years, he has been working as a certified Microsoft Business Applications Consultant transforming business processes for companies in the financial, health, oil and gas, manufacturing, and insurance industries.

**ROUNDTABLE BULLETS:**

- Actuarial analysis will be heavily relied upon in order to build industry benchmarks covering the scope of internal, external, competitive and industry markets.
- Public & private partnerships along with compliance and product liability resources have been poorly distributed throughout the risk industry. In addition to capital assets, hard and soft assets need to be reviewed and reallocated, if necessary.
- Insurance renewal dates are being conducted ahead of time (120 days vs the 90 days).
- Key performance indicators (loss history, financial structure, and forecasting) carry more weight by potential insurers at the time of renewal.
- Insurance markets are restricting coverage on all lines of insurance that are resulting in a rise of higher premiums and/or nuclear judgements.
- Small business owners are especially risk vulnerable. A parametric product can help avoid or mitigate the indemnification of a full loss.
  - a) A parametric product pays out a predetermined dollar amount before a loss is incurred which would lead to an immediate payout without a claim process.
- Resiliency planning for a company's respective risk portfolio will be key in 2020/ 2021.
- Risk profiles are changing. How can we create efficient risk transfer solutions at an affordable premium?



- A hybrid prototype of managed-care resources should be strongly considered in 2020/2021, with an emphasis on both service quality and claim outcome.
- TPAs and carriers have grown sensitive to the accommodation of guaranteed cost programs. One has more leverage and leeway with a high deductible business portfolio.
- Compensable consequence will now be more of an issue when it comes to the assessment of workplace Covid-19 infections and any malingering mental or physical conditions that may develop thereafter.
- Depending on the carrier, a single occurrence for multiple Covid-19 claims is only reportable within 7 days of occurrence. In some cases, it can be up to 30 days.
- The HR interactive process should serve as a resource to boost injury morale and be a filter to identify contributing cause or foul play.



- Strengthen business relationships with testing facilities and get to know medical infrastructure and types of tests offered.
- Are bill review fees subject to change due to telemedicine and virtual treatment replacing brick and mortar medical establishments?
- Utilization review should consider “1-time allowances” for certain medical proceedings which are unavoidable after surgery; blood testing and physical therapy (not to exceed 3 visits) to name a few.
- Virtual medical resources have grown exponentially and have been far extended to cover all types of medical needs.
- Connectivity and continuity will be the new efficacies to follow when dealing with our work from home workforce.
- Claims are down 36%, first and second quarter of 2020 compared to last year.
- Attention should be put on bundled features that are revenue generators.
- Other risks like guest liability, physical altercations in the workplace, non-compliance of PPE are adding insult to injury in the workplace.
- Always ask how scalable claim applications are before installment. Platforms should be capable of quick modification for little to no cost. How secure is the system? Does it adhere to all best practices and security standards, such as HIPPA or GDPR?
- Virtualization and telecommuting platforms will improve with time. The managing and security of sensitive data will be the focal point moving forward with new technologies.





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