



Reward & Employee
Benefits Association

Future of Workplace Health and Protection Summit Event Guide

Wednesday 6th March 2024

Welcome

We're delighted to welcome you to the first REBA Future of Workplace Health and Protection Summit. Today we've gathered industry leaders, stakeholders, and top employers together to share knowledge and explore the range of factors impacting employer-funded health and risk benefits and how they will affect workforce healthcare provision.

Throughout the day's programme you'll hear from experts and peers about what strategies could be employed to mitigate people and business risk in the current market. By attending today's event with fellow leaders at the forefront of employee health and wellbeing, you'll be involved in shaping the future of workplace health and protection.

Please introduce yourself to everyone you meet, share your knowledge, and ask questions throughout the day. We all learn from one another, and REBA is delighted and proud to be a catalyst for collaboration.

We hope you'll join us at 4.00pm for a relaxed drinks reception, where you can continue to connect and share your thoughts from the day.

Warm regards, Debi O'Donovan, Phil Hayne & the whole REBA team

Thanks to the Summit sponsors:



Free venue wifi

Network: RWNET
Password: 19867591

www.reba.global



Agenda at a glance

| | | | |
|---------------|---|--|-------------------------------|
| 08:30 - 09:00 | Breakfast and registration | | Benjamin Franklin |
| 09:00 - 09:15 | Welcome from the chair and REBA state of the nation on workplace healthcare and protection and the impact on reward & benefits Debi O'Donovan, Co-founder & Director, REBA | | Great Room |
| 09:15 - 10:00 | Panel debate: How are employers mitigating the costs of employer-funded health and risk? In the face of rising insurance costs and the increasing health risks associated with an ageing workforce, employers are being forced to rethink and redesign their workforce health benefits funding, reviewing what they offer and how they offer them. Moderator: Debi O'Donovan, Co-founder & Director, REBA <ul style="list-style-type: none"> • Rogier Bouwman, Global Pensions and Benefits Manager, Heineken • Dana Citron, Director, Global Health and Wellbeing, DHL Group • Rosie Lacey, Head of Pension & Benefits at Costain • Samantha Sergent, Director, International Benefits, Microsoft | | Great Room |
| 10:00 - 10:25 | Spotlight sessions: short sharp talks from important industry commentators to provide a flavour of the bigger picture issues and address key themes discussed in the panel. Spotlight talk 1: Understanding the health risks coming down the line (and how to manage and mitigate claims and costs) Dr Subashini M, Medical Director, Aviva Spotlight talk 2: Latest industry insights and update on the government occupational health and tax consultations as seen by the Association of British Insurers Yvonne Braun, Director of Policy, Long Term Savings and Protection, ABI | | Great Room |
| 10:25 - 10:40 | Q&A session with the two spotlight speakers led by Debi O'Donovan, Co-founder & Director, REBA | | Great Room |
| 10:40 - 11:00 | Networking coffee break | | Benjamin Franklin |
| 11:00 - 12:00 | Workshop session 1 7 workshops run concurrently, see your personal agenda Details on next page | 11:10 - 12:50 Strategic stakeholder workshop session Vaults 2 | See overleaf for room details |
| 12:10 - 13:10 | Workshop session 2 7 workshops run concurrently, see your personal agenda Details on next page | | |
| 13:10 - 14:15 | Seated networking lunch See your personalised agenda | | The Vaults |
| 14:15 - 15:00 | Panel debate: Drivers of change in the design, use and delivery of employer-funded health and protection A perfect storm of macro-factors are impacting both group insurances and health trusts. From inflation and budget compression across the globe through to medical supply chains and the war for talent, employers, brokers and providers are having to rethink employer-funded workplace health and protection. Moderator: Debi O'Donovan, Co-founder & Director, REBA <ul style="list-style-type: none"> • Hugh Bennett, Head of Corporate Healthcare, Howden Employee Benefits & Wellbeing • James Spencer, Head of Health & Benefits Europe, WTW • Adrian Matthews, Head of Employee Benefits UK and Europe, MetLife • Jenni Wilson, Expert health insurance and healthcare industry consultant | | Great Room |
| 15:05 - 15:50 | Panel debate: The workforce and demographic shifts that are bringing new prevention eco-systems and vocational rehabilitation support to the fore The proliferation of add-on and support services to support prevention and vocational rehabilitation have exploded in recent years. From menopause and fertility support through to neurodiversity assessments and carers support, the list keeps growing. Can these really keep a health costs under control in increasingly diverse and ageing workforces? We ask our panel how to work with your providers and brokers to use these new eco-systems to best advantage. Moderator: Debi O'Donovan, Co-founder & Director, REBA <ul style="list-style-type: none"> • Dr Luke James, Partner - Workforce Health Leader, Europe, Mercer Marsh Benefits • Daniela Masters, Head of Global Health and Wellbeing Programs, Generali • Vanessa Sallows, Underwriting and Benefits Director, Legal & General • Jan Vickery, Wellbeing Lead, AXA Health | | Great Room |
| 15:50 - 16:00 | Final remarks and close of conference | | Great Room |
| 16:00 - 16:45 | Networking drinks | | Benjamin Franklin |



Workshops at a glance

| | | |
|---------------|--|--------------------|
| 11:00 – 12:00 | Workshop session 1 7 workshops will be hosted concurrently by the sponsoring partners | |
| | Right care and support, first time - the power of impactful wellbeing initiatives and effective private healthcare to address health risks and deliver value Facilitated by AXA Health | Shipleigh |
| | Health premiums are on the rise, how organisations can shift to proactive measures via strategic engagement Facilitated by Bupa / JAAQ | Henry Cole |
| | Is a Healthcare Trust the right option for your organisation? Facilitated by Healix Health | Tavern |
| | The healthcare conundrum: balancing cost, cover and employee vs employer responsibility Facilitated by Howden Employee Benefits & Wellbeing | Great Room |
| | Global medical trends: cost and risk implications for health and protection insurance over the next 2-5 years Facilitated by Mercer Marsh Benefits | Queen Elizabeth II |
| | Using Multinational Pooling or Captives for cost efficiency and better control of risks Facilitated by MetLife | Folkestone |
| | How AI will improve engagement with employee benefits and cut global workplace health costs Facilitated by Peppy | Prince Phillip |
| 12:10 – 13:10 | Workshop session 2 7 workshops will be hosted concurrently by the sponsoring partners | |
| | Right care and support, first time - the power of impactful wellbeing initiatives and effective private healthcare to address health risks and deliver value Facilitated by AXA Health | Shipleigh |
| | Health premiums are on the rise, how organisations can shift to proactive measures via strategic engagement Facilitated by Bupa / JAAQ | Henry Cole |
| | Is a Healthcare Trust the right option for your organisation? Facilitated by Healix Health | Tavern |
| | The healthcare conundrum: balancing cost, cover and employee vs employer responsibility Facilitated by Howden Employee Benefits & Wellbeing | Great Room |
| | Managing and mitigating health risks and costs: driving value for spend through preventative wellbeing services Facilitated by Mercer Marsh Benefits | Queen Elizabeth II |
| | Using Multinational Pooling or Captives for cost efficiency and better control of risks Facilitated by MetLife | Folkestone |
| | How AI will improve engagement with employee benefits and cut global workplace health costs Facilitated by Peppy | Prince Phillip |





Workshops & Facilitators

Right care and support, first time - the power of impactful wellbeing initiatives and effective private healthcare to address health risks and deliver value

11:00 – 12:00

12:10 – 13:10

Shipleigh

In association with AXA Health

- Delivering value through your benefits supply chain
- Supporting claims, getting members to the right care, first time
- Evolving benefits to support critical employee life stages
- The hidden cost benefits and savings of extending benefits to family members
- Managing health to manage cost through preventative health and wellbeing products and services
- Using data insights to identify employee risk across your organisation – targeting support at those most in need

About your facilitators



Sarah Hughes

Head of Client Management, AXA Health

E: sarah.2.hughes@axahealth.co.uk

Sarah provides strategic oversight to ensure the direction and delivery of our service matches our clients' strategic vision for healthcare, linking in what we are doing as a business and market trends and insight.

Sarah is a well-known senior figure in the UK Corporate Healthcare and Wellbeing market with 30 years' experience in the sector. Predominately working in partnership with clients, intermediaries, and key business partners, Sarah has extensive experience in employee benefits and design and delivery of corporate health and wellbeing programmes.



Sarah Goodwin

Head of Strategy, AXA Health

E: sarah.goodwin@axahealth.co.uk

Sarah leads the strategy division within AXA Health, responsible for monitoring key market developments, setting the strategic direction of the business, and ensuring that AXA Health maintains a focus on achieving its core ambition. The delivery of the team includes leading on corporate developments such as strategic partnerships and acquisitions.

Sarah has worked in a range of roles across the AXA Group, including roles within AXA's global head office based in Paris. Most recently, Sarah led the programme to launch the AXA Health Plan, a fully flexible, digital-first private healthcare offering for individuals and their families.

About AXA Health

AXA Health, AXA's UK health and wellbeing specialist can keep your business happy and healthy, and help your employees bring their best selves to work. We've spent decades working alongside businesses large and small, so our dedicated business team has a deep understanding of what helps businesses stay well, and how we can help make that happen. And we can tailor what we offer so perfectly because we have an extraordinary breadth of services – our private medical insurance expertise is only the start.

Our wellbeing products and services can help you unwrap the long-term value of health and wellness in ways that really work – for everyone.

Private Medical Insurance – Private Healthcare Trusts – Employee Assistance Programme (EAP) – Occupational Health – Wellbeing Services.



Workshops & Facilitators

Health premiums are on the rise, how organisations can shift to proactive measures via strategic engagement

11:00 – 12:00

In association with Bupa / JAAQ

12:10 – 13:10

- Increasing health premiums and costs: causes and solutions to collectively to address this
- What gets measured, gets incentivised, gets improved?: using data to build the business case and to drive meaningful change
- How to use renewed understandings to move from reactive approaches to proactive wellbeing at work
- How to level up engagement to reach 'hard to reach' groups, demographics, generations
- Unlocking the middle layer - shifting from 'management' to 'positive leadership'

Henry Cole

About your facilitators



Daniel Sullivan

Director of Proposition and B2B Marketing, Bupa

E: daniel.sullivan@bupa.com

Daniel Sullivan is Bupa's Director of Proposition and B2B Marketing for UK Insurance. Daniel joined Bupa UK in 2021 from KPMG UK where we held a variety of roles, including Director of KPMG's Marketing Centre of Expertise. Daniel's career has focussed on B2B marketing in financial services, including roles at Lloyds Banking Group and Unum.



Ryan Hopkins

Chief Impact Officer, JAAQ

E: ryan@jaaq.org

Ryan Hopkins is leading the UK's Workplace Rebellion and intends to engage 1 billion people in the betterment of wellbeing. Ryan is a global best selling author, Chief Impact Officer at JAAQ, formerly the Future of Wellbeing Leader at Deloitte and speaks all over the world on how we can create a future of work where individuals and organisations thrive.

About JAAQ /Bupa

JAAQ at Work is the leading engagement led wellbeing platform. Using interactive video conversations with leading workplace experts, medical doctors & people with lived experience across over 60 topics including the likes of burnout, E,D&I and anxiety. We cover topics from an employee, a manager and an organisation perspective.

JAAQ at Work will help you to understand your employees better through our real time behavioural led data, anonymised and amalgamated to drive psychological safety.

Through providing customisation options to film your current benefit providers we are able to provide a clear hub for discovery and sign-posting, increasing the usage of not just JAAQ but your entire suite of wellbeing products.

We also go beyond the tech and help drive engagement through a powerful suite of tools such as in-person events, online power hours, in-depth business GAP analysis strategy sessions to drive real impact.



Workshops & Facilitators

Is a Healthcare Trust the right option for your organisation?

11:00 – 12:00

12:10 – 13:10

Tavern

In association with Healix Health

- Exploring viability, impact, costs, experience and administration of healthcare trusts
- What are the key criteria to have in place before considering a trust
- What are the design pros and cons of a trust for your workforce

About your facilitators



John Dean

Consulting Development Director, Healix Health

E: john.dean@healix.com

John has over 30 years' experience in the sector leading independent intermediaries and award-winning healthcare trust consulting businesses. John is an expert in healthcare trusts and has worked with many of the largest UK employers helping them build bespoke corporate healthcare solutions.

John is leading the Healix Health response for larger clients and is working with brokers and prospects to understand our proposition.



Sharon Burgess

Operations Director, Healix Health

E: sharon.burgess@healix.com

Sharon, a seasoned operational leader, has an extensive background with top healthcare administrators. Sharon is deeply dedicated and driven to providing exceptional service, promoting options, and facilitating simplicity.

About Healix Health

Healix Health offers a flexible approach to healthcare that's bespoke to our clients' health and wellbeing requirements. Selecting which services would be most beneficial, paying for what you use – and nothing else. Using **Healthcare Trusts** to tailor benefits and providing expert clinical insight and advice, we give you control over your health and wellbeing strategy, helping ensure the most effective use of your overall budget.

Healix



Workshops & Facilitators

The healthcare conundrum: balancing cost, cover and employee vs employer responsibility

11:00 – 12:00

12:10 – 13:10

Great Room

In association with Howden Employee Benefits & Wellbeing

- How do you articulate the value of your health & protection benefits? Where do they have positive business impact?
- When it comes to absence and productivity, can you measure the impact these benefits are having?
- Where are these benefits not delivering on those business outcomes (even if delivering value to employees)?
- If you have people with and without access to these benefits, do you see a difference in those outcomes?
- Do you see trends within the use of these benefits that highlights growing concerns (mental or physical)?
- To what extent are inflationary pressures impacting the future affordability of the benefits (in their current design)?
- What will this mean for the future of health and protection benefits design, funding and eligibility?
- How can benefits decision-makers get business leadership to respond positively to pressures to invest more?

About your facilitators



Matthew Gregson

Executive Director, Howden Employee Benefits & Wellbeing

E: matthew.gregson@howdengroup.com

Matthew oversees all aspects of Howden's proposition for corporate clients. He has over 20 years' experience in employee benefits, including a large portion of his career helping shape the flexible benefits market in the UK. Matthew has personally helped many large and complex employers introduce transformational change to their pension and benefits programmes, working with providers and partners in industry to innovate and maximise the value they bring to clients.



Hugh Bennett

Head of Corporate Healthcare, Howden Employee Benefits & Wellbeing

E: hugh.bennett@howdengroup.com

Hugh, a seasoned professional with a decade of industry expertise, joined Howden Employee Benefits & Wellbeing in 2014. Holding certifications in Cert CII (Health & Protection) and ILM Level 3 Diploma in Management, he serves as the Head of Corporate Healthcare. In this pivotal role within the Corporate Consulting business, Hugh spearheads strategic initiatives. Despite his leadership responsibilities, he remains hands-on, overseeing a portfolio of corporate clients at Howden. Hugh is committed to supporting clients and finding the best outcomes for them, highlighting his dedication to their success.

About Howden Employee Benefits & Wellbeing

Howden Employee Benefits & Wellbeing is a leading employee benefits consultancy, advising across the spectrum of small to multinational employers, helping them maximise their investment in benefits and wellbeing, through consultancy, broking, technology and communications services. We have won many industry awards for our work and are widely recognised for our innovative and creative people-first approach to benefits design.



Workshops & Facilitators

Global medical trends: cost and risk implications for health and protection insurance over the next 2-5 years

11:00 – 12:00

Queen Elizabeth II

In association with Mercer Marsh Benefits

- Identifying key medical risks for your global employee population and specific country risks to prioritise focus
- Setting a global insurable employee risk strategy to deliver stability and predictability
- Implementing a robust global governance structure to enable effective cost control and programme management
- Ensuring your insurance and protection insurances are fair, equitable and inclusive in the face of rising costs
- Managing corporate and employee expectations around employer-funded international healthcare provision

About your facilitators



Alice Harkness

Multinational Client Leader for Europe,
Mercer Marsh Benefits
alice.harkness@mercermarshbenefits.com

Alice Harkness is responsible for the service delivery to our Global Benefits Management clients. She has been with MMB for 7 years, with 5 of those years covering Asia whilst located in Singapore. She has worked with many multinationals (specialising in Technology), supporting them on their benefits journey through the Global Benefits Management model and has a particular passion for enabling equity and inclusion.



Dan Clark

MMB Multinational Commercial Leader UK,
Mercer Marsh Benefits
E: daniel.clark@mercer.com

In his role, Daniel works closely with the UK's largest multinational organisations, assisting them in navigating the complexities, challenges, and people risks associated with having a global workforce. By leveraging his extensive experience and understanding of the industry, Daniel assists organisations in developing effective strategies to address the unique needs of their globally diverse workforce.

Managing and mitigating health risks and costs: driving value for spend through preventative wellbeing services

12:10 – 13:10

Queen Elizabeth II

In association with Mercer Marsh Benefits

- Managing health to manage cost through preventative health and wellbeing products and services
- How to drive more value from your suppliers
- Addressing ageing workforce risks
- What we're seeing with virtual GP utilisation and onward referral
- Shifting utilisation of employer schemes due to NHS pressures

About your facilitators



Dr Luke James

Partner – Workforce Health Leader, Europe,
Mercer Marsh Benefits
E: luke.james@mercer.com

Luke is a highly accomplished medical doctor with over 25 years of experience in the field. Throughout his career, he has made significant contributions to both global and domestic medical insurance, demonstrating his expertise in healthcare leadership. In recognition of his outstanding achievements, Luke was honoured with the Healthcare Leadership Award from Health 2.0 in 2022. Luke joined MMB in April 2023.



Shelley-Ann Bridges

Client Director, Mercer Marsh Benefits
E: shelley-ann.bridges@mercermarshbenefits.com

Shelley has over 20 years' employee benefits consulting experience, incl. managing complex corporate clients from medium to large FTSE100 multinational organisations, providing strategic and relationship support. She started her career working for a market leading insurer in both the UK and international markets. She also leads MMB's UK Health Market Development group, which has responsibility for ensuring that MMB are the market leader in Healthcare related consulting.

About Mercer Marsh Benefits

Mercer Marsh Benefits provides clients with one source for managing the costs, people risks, and complexities of employee benefits. The network is a combination of Mercer and Marsh experts working across 130 countries to develop local solutions drawn from global expertise. Mercer and Marsh are businesses of Marsh McLennan (NYSE: MMC), the world's leading professional services firm in the areas of risk, strategy and people, with more than 85,000 colleagues and annual revenue of over \$20 billion. Through its market-leading businesses including Guy Carpenter and Oliver Wyman, Marsh McLennan helps clients navigate an increasingly dynamic and complex environment. For more information, visit marshmclennan.com, or follow us on LinkedIn and Twitter.



Workshops & Facilitators

Using Multinational Pooling or Captives for cost efficiency and better control of risks

11:00 – 12:00

12:10 – 13:10

Folkestone

In association with MetLife

- Learn how global EB programmes like Multinational Pooling, Captives and Global Underwriting work
- Discover the five signs that you're ready to start a global EB programme for your organisation
- Find out how you can use your global and local claims data to tailor your EB plan design and wellness initiatives to meet the needs of your employees

About your facilitators



Nick Pemberton

Head of Strategic Partnerships, MetLife

E: nick.pemberton@metlife.com

Nick is an accomplished employee benefits professional with over 25 years' experience in benefits consultancy and group risk insurance markets. In his role at MetLife, Nick is responsible for driving the development of client multinational programmes and he leads the strategic partnership with MAXIS, MetLife's global benefits network partner.



Nicola Fordham

Chief Underwriting Officer, MAXIS GBN

E: nicola.fordham@maxis-gbn.com

As Chief Underwriting Officer at MAXIS GBN, Nicola Fordham leads a team of pricing underwriters who work closely with the MAXIS network of local insurers, the MAXIS EU Underwriting Hub, and our multinational clients. The team uses their expertise to oversee the pricing and underwriting of business included in global programmes, providing support when needed and strong, technical, underwriter to underwriter relationships.

Nicola joined MAXIS GBN in 2017 from MetLife UK where, as Chief Pricing Underwriter, she was responsible for the technical relationship between MetLife UK and MAXIS. Nicola has a wealth of knowledge to draw upon, with more than 20 years' experience as a pricing underwriter for organisations including, Zurich, Generali and Unum.

About MetLife

With over 150 years of experience, MetLife is a leading innovator and recognised leader in protection planning, retirement saving solutions around the world. We have established a strong presence in over 40 countries through organic growth, acquisitions, joint ventures and partnerships. Around the world, MetLife offers a range of different products and services. We offer our customers life, accident and health insurance options as well as retirement and savings solutions.

We work with families, companies and governments to provide them with solutions that offer financial guarantees and provide certainty in an uncertain world. We're proud to say that our name is recognised and trusted by over 100 million of our customers worldwide.



Workshops & Facilitators

How AI will improve engagement with employee benefits and cut global workplace health costs

11:00 – 12:00

12:10 – 13:10

Prince Phillip

In association with Peppy

- AI is set to transform all areas in the workplace, and healthcare benefits will be no exception.
- But what tools and products are available now to take advantage of AI? And what tools and products are coming down the track?
- What are your most forward-thinking peers doing now to position themselves for the future?
- What are the key points to consider linked to employee trust, safety and privacy when it comes to AI and healthcare benefits?

About your facilitators



Evan Harris

Co-founder & CEO, Peppy

E: evan@peppy.health

Evan Harris is the Co-Founder and CEO at Peppy, with a mission to transform digital healthcare. Following his training at PwC, Evan has worked in senior healthcare roles at the NHS, Viapath, Medopad/Huma and the The Centre for Health and Disability Assessments. Evan primarily focuses on strategy, products and technology at Peppy.



Max Landry

Co-CEO, Peppy

E: max@peppy.health

Max Landry is Co-Founder and Co-CEO of digital health platform, Peppy. Max has spent his career launching and building businesses. Before launching Peppy in 2018, he co-founded and served as Chief Executive of The Conversation. Prior to that he co-founded and served as Managing Director of Paperstone, one of the first online suppliers of office products. Max is driven by his ambition to make personalised, expert-led health support available to everyone, regardless of job role or salary. Beyond work, he loves cooking, boxing and spending time with his young family.

About Peppy

Peppy is the solution for businesses managing the crunch of employee healthcare access and budget constraints. As NHS pressures mount, leaving many without timely care, Peppy navigates your employees to expert care when it really matters. It's not just an AI-powered healthcare hub; it's a cost-effective ally for employers committed to their workforce's wellbeing in an era of tightening belts. We're proud to partner with over 250 leading companies; JP Morgan, TJX, and Disney are just a few you may recognise. Together with our partners, like AXA and Vitality, we support over a million lives.





Speaker Profiles



Hugh Bennett

Head of Corporate Healthcare, Howden Employee Benefits & Wellbeing

Hugh, a seasoned professional with a decade of industry expertise, joined Howden Employee Benefits & Wellbeing in 2014. Holding certifications in Cert CII (Health & Protection) and ILM Level 3 Diploma in Management, he serves as the Head of Corporate Healthcare. In this pivotal role within the Corporate Consulting business, Hugh spearheads strategic initiatives. Despite his leadership responsibilities, he remains hands-on, overseeing a portfolio of corporate clients at Howden. Hugh is committed to supporting clients and finding the best outcomes for them, highlighting his dedication to their success.



Rogier Bouwman

Global Pensions and Benefits Manager, Heineken

Rogier is responsible for the central oversight and coordination of all local pension and insured benefit plans. He is Chairman of the Board at HEINEKEN's Employee Benefit Captive. He is also Chairman of the Board at HEINEKEN's largest pension fund (based in the Netherlands) and an Investment Committee member at HEINEKEN pension funds in the UK, Netherlands, Mexico and Switzerland.

Prior to working at HEINEKEN, Rogier worked as a Senior Manager at Deloitte in the Pensions & Benefits advisory team. He holds Master degrees in Econometrics and Mathematics and is a Certified Financial Risk Manager



Yvonne Braun

Director of Policy, Long Term Savings and Protection, ABI

Yvonne directs the ABI's work on pensions, including ESG and sustainable investment, and protection insurance, and oversees the finance department and data analysis team. She joined the ABI from the Financial Services Authority, where she worked in policy and public affairs. She previously was a capital markets lawyer at Goldman Sachs and the US law firm Cleary Gottlieb.



Dana Citron

Director, Global Health and Wellbeing, DHL Group

Through evaluating historical health risks and trends in a country and on a business unit basis, Dana works with the global, regional and local HR partners to offer tailored health and well-being guidance and solutions that specifically target primary cost and claim drivers.

For the prior 12 years, Dana worked in the international insurer domain developing health products and promoting strategies that target and control healthcare costs while maximising employee health. This included working with local insurance affiliates to design and implement end to end market-leading health management and wellness solutions. She also worked with multinational clients, providing health analytics, thought leadership and support for the development of global health strategies.



Dr Luke James

Partner – Workforce Health Leader, Europe, Mercer Marsh Benefits

Luke is a highly accomplished medical doctor with over 25 years of experience in the field. Throughout his career, he has made significant contributions to both global and domestic medical insurance, demonstrating his expertise in healthcare leadership. In recognition of his outstanding achievements, Luke was honored with the Healthcare Leadership Award from Health 2.0 in 2022. Luke joined MMB in April 2023 as the Workforce Health Leader for Europe. Prior to this role, he held senior leadership positions in a global insurer and corporate healthcare provider, most notably serving as the Deputy Group Chief Medical Officer. During this time Luke played a pivotal role in shaping the company's medical strategy and ensuring the delivery of high-quality healthcare services to clients.



Speaker Profiles



Debi O'Donovan

Co-founder & Director, REBA

Debi co-founded REBA in 2015 and is Director of REBA. Debi enjoys sharing insights, data and information about employee benefits and pay via articles, research, guides and videos. She believes it helps so many employees receive better reward packages than they would if REBA didn't distribute this knowledge. REBA has a great community with a wide variety of people working in reward and benefits coming together through REBA events, both large and small.



Reward & Employee Benefits Association



Rosie Lacey

Head of Pension & Benefits, Costain

Rosie has worked in pensions & benefits for over 30 years. She has extensive experience in the UK and Ireland industry having worked in in-house roles across a number of industry sectors from finance to construction. It was through her time as Communications Manager for the AA and then Barclays that she developed her passion for talking about everything pensions and financial wellbeing. For Rosie, benefits are core to any wellbeing or financial wellbeing strategy. In this time of crisis in the medical sector, Rosie is focused on how Costain can support colleagues to get the treatment they need through joined up use of their medical plan and services offered via GIP. Rosie has been on the PMI advisory council for over five years supporting a number of the committees and is delighted to be starting her second term as vice-president of the PMI and NED on the PMI Board.



Daniela Masters

Global Health & Wellness Director, Generali Employee Benefits

With 15 years of practical experience, Daniela has gained considerable knowledge about successful multinational corporate health & wellbeing strategies and programmes from multiple perspectives: employer, wellness / EAP provider, and private insurer. For the past 5 years she has enjoyed actively working on global Health & Wellness Programmes with clients, intermediaries and Network Partners of the Generali Employee Benefits Network (GEB). A data-driven approach stands at the centre of her work, and she has shared her experience as a subject matter expert speaker at numerous international industry events. Daniela's motto: "Healthy and safe companies are growing companies"



Adrian Matthews

Head of Employee Benefits, UK & Europe, MetLife

Adrian joined MetLife in May 2011 as Chief Finance Officer for the UK, he was appointed Employee Benefits Director for the UK in June 2017, and from January 2023 expanded his role to cover an additional 10 European markets. Adrian is responsible for driving substantial growth in the Employee Benefits line of the business. As well as his expanded European role, he is a member of the UK Executive Committee. In his prior role as Chief Finance Officer, he oversaw the financial management and performance of the business, where he drove efficiency and effectiveness throughout. Adrian is an Associate Member of the Chartered Institute of Management Accountants.



Speaker Profiles



Dr Subashini M

Medical Director, Aviva

After qualifying as a doctor, Suba trained as a surgeon, working in NHS and private hospitals. Her clinical research includes molecular pathology, patient reported outcomes and subjective wellbeing.

Since joining Aviva in 2015, Suba provides clinical insight, including:

- assessing scientific evidence for new healthcare treatments
- identifying and contracting with high quality healthcare providers
- co-designing innovative healthcare propositions for unmet clinical and customer needs.

Her priority is to ensure Aviva sustainably and affordably funds healthcare offering high clinical quality and an excellent customer journey.



Samantha Sergent

Director, International Benefits, Microsoft

Samantha Sergent plays a pivotal role in shaping benefit programs & experience for Microsoft employees and their families in over one hundred countries. With a 13-year tenure at Microsoft, Samantha has traversed a multifaceted career path, spanning a diverse set of roles in both HR Shared Services and Total Rewards. Her career has been characterised by a commitment to transformation and operational excellence.

Samantha's career took a turn six years ago when she shifted her focus to employee benefits. Since that pivotal move, every day has been a new challenge, an opportunity for fresh insights, and an adventure that spans across regions, countries, and markets.

In 2020, Samantha embarked on another exciting chapter in her life when she relocated to the UK, a bold decision made during the tumultuous year. Together with her husband and their two children, Samantha continues to embrace change, learning, and growth.



Vanessa Sallows

Claims & Governance Director, Legal & General

Vanessa Sallows is the Claims & Governance Director at Legal & General and has over 30 years' experience working in the NHS, private industry, and the protection market. Vanessa has responsibility for the claims and clinical area within Legal & General's Group Protection business, oversight of the Group Protection medical underwriting philosophy and operational oversight of the Retail Protection income protection claims. Vanessa is passionate about the psychology of work, what prevents individuals from working during periods of ill-health and helping people return to 'good work'. Vanessa developed the early intervention, pro-active claims management and vocational rehabilitation approach that Legal & General use to assess & manage their Group and Individual Income Protection claims. Vanessa led the implementation of the Mental Health First Aiders (MHFAs) within Legal & General and in conjunction with colleagues developed and delivered Legal & General's Not A Red Card campaign and the Be Well, Get Better, Be Supported framework.



James F. Spencer MBA

Senior Director, Health & Benefits Europe, WTW

James is Senior Director for WTW Health & Benefits, focused on growing revenue and client acquisition in 13 markets across Great Britain and Continental Europe (excl. France). Responsible for deploying consulting tools, reaching prospect and client community and harnessing WTW talent to drive superior results.

For over a decade James has been an advisor on benefit strategy, design, and broking employee benefits both domestically and internationally; including for numerous FTSE350 and Fortune 500 employers. He has hands-on experience supporting business leaders with clear decisions on complex issues.

James has been a featured speaker at industry conferences, is a frequent author and has been quoted in publications including: Financial Times, Health Insurance Daily, The Telegraph, Employee Benefits Magazine, AIRMIC, REBA and International Travel & Insurance Journal in addition to Willis Towers Watson Wire.



Speaker Profiles



Jan Vickery

Wellbeing Lead, AXA Health

Jan is Category Lead within Wellbeing at AXA Health, following a 10 year period as Head of Clinical Operations for Occupational Health, Musculoskeletal Health and Psychological Health services. In her role, she oversees and develops health and wellbeing propositions for AXA Health clients, staying close to the evolving needs of employers and employees. Jan is a Chartered Physiotherapist and a Registered Ergonomist. She has worked in Occupational Health for over 20 years and serves on the Faculty of Occupational Medicine's Ethics Committee.



Jenni Wilson

Expert health insurance and healthcare industry consultant

Jen is an experienced Commercial Director with extensive sales and marketing, P&L management and organisational change experience in the Healthcare and Health Insurance sectors. Her 30 year corporate career spans Director roles at Bupa, AXA Health, Nuffield Health and Simplyhealth.

As Group Sales Director for Simplyhealth, Jen championed the organisation's purpose of making healthcare easy to access for as many people as possible by growing Simplyhealth and Denplan's 2.5m customer base across both corporate and consumer markets.

Prior to this, Jen was Commercial Director for Nuffield Health's Hospitals division. She led the commercial development of all 3 key hospitals payors: PMI, NHS and Self Pay.

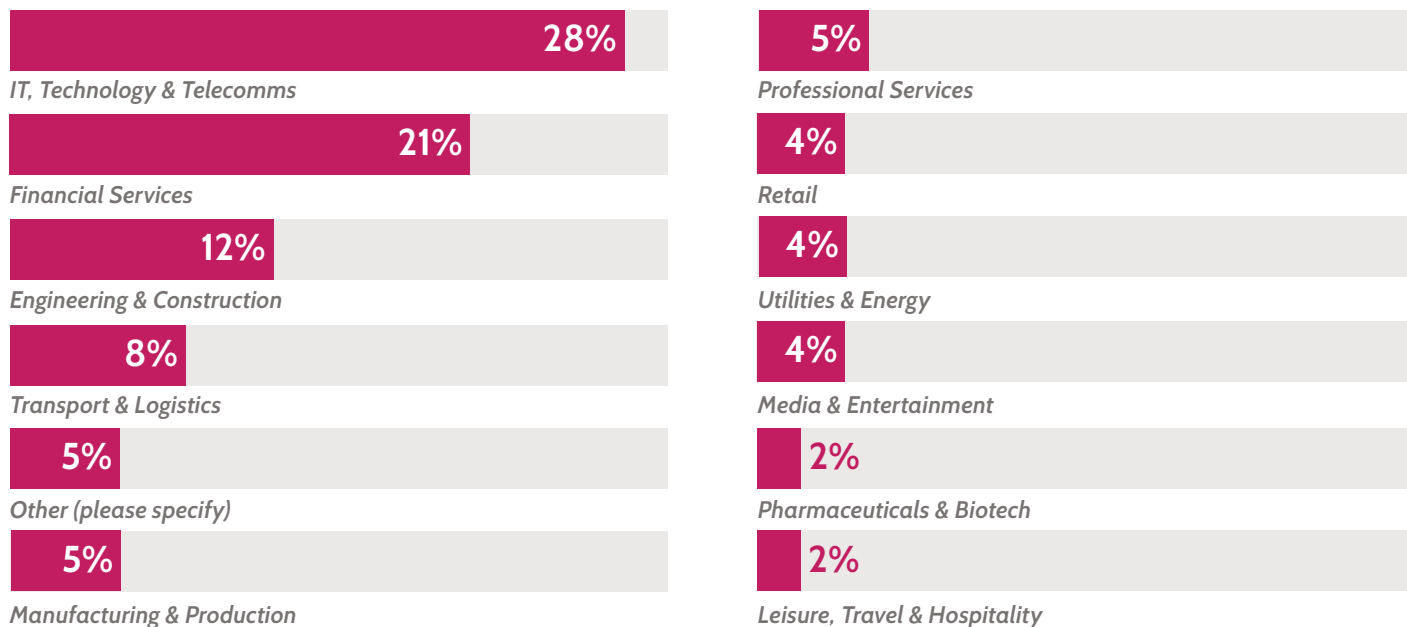
Jen recently founded All About Clarity and now works freelance as a Board Adviser, Business Mentor and Executive Coach.



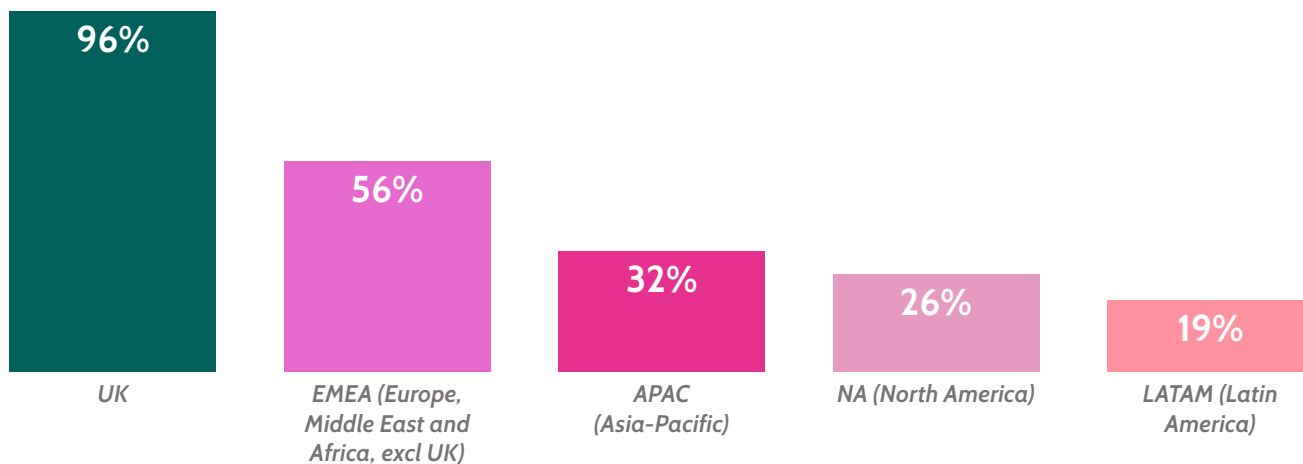


Attendees' Survey Findings

Industry sectors represented at the Future of Workplace Health and Protection Summit

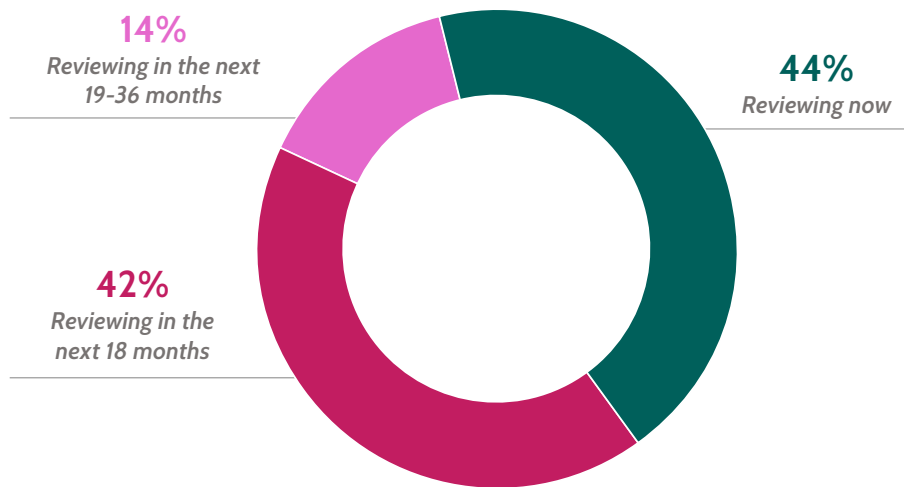


Attendees have responsibility for the following regions

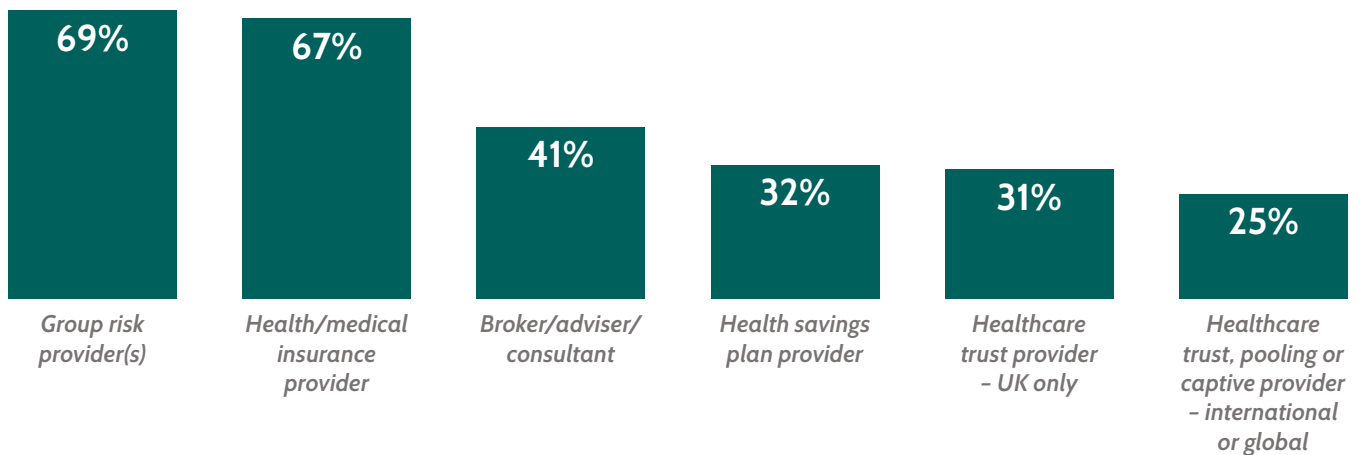


Attendees' Survey Findings

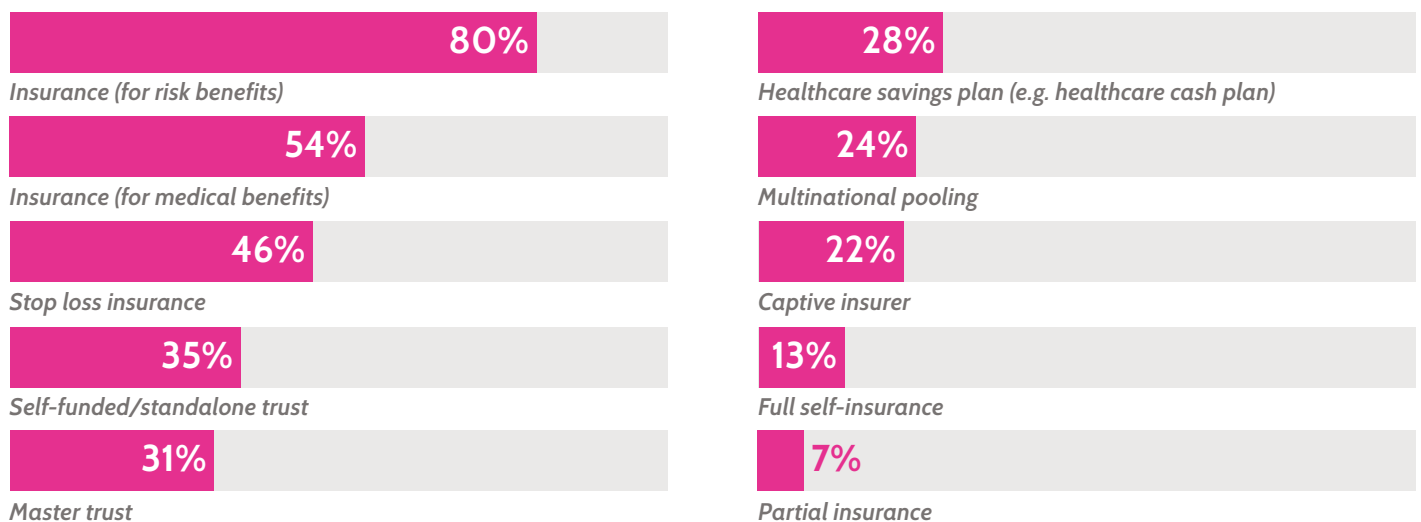
Attendees are reviewing their health and protection strategy



Attendees are reviewing the following service providers

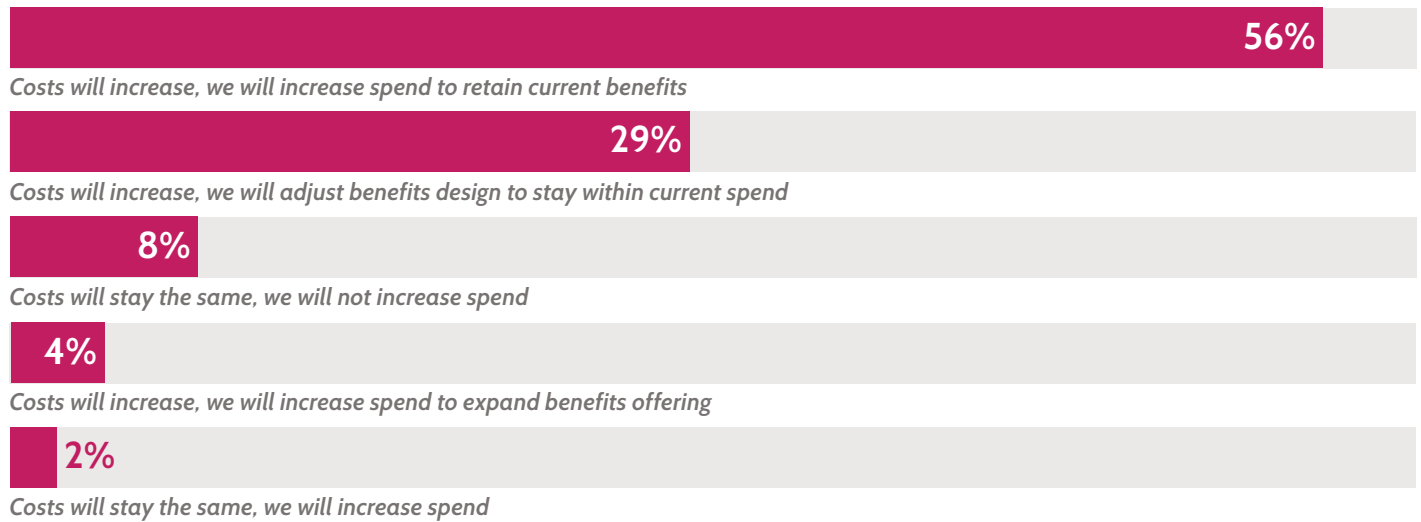


Top methods of funding medical and risk benefits

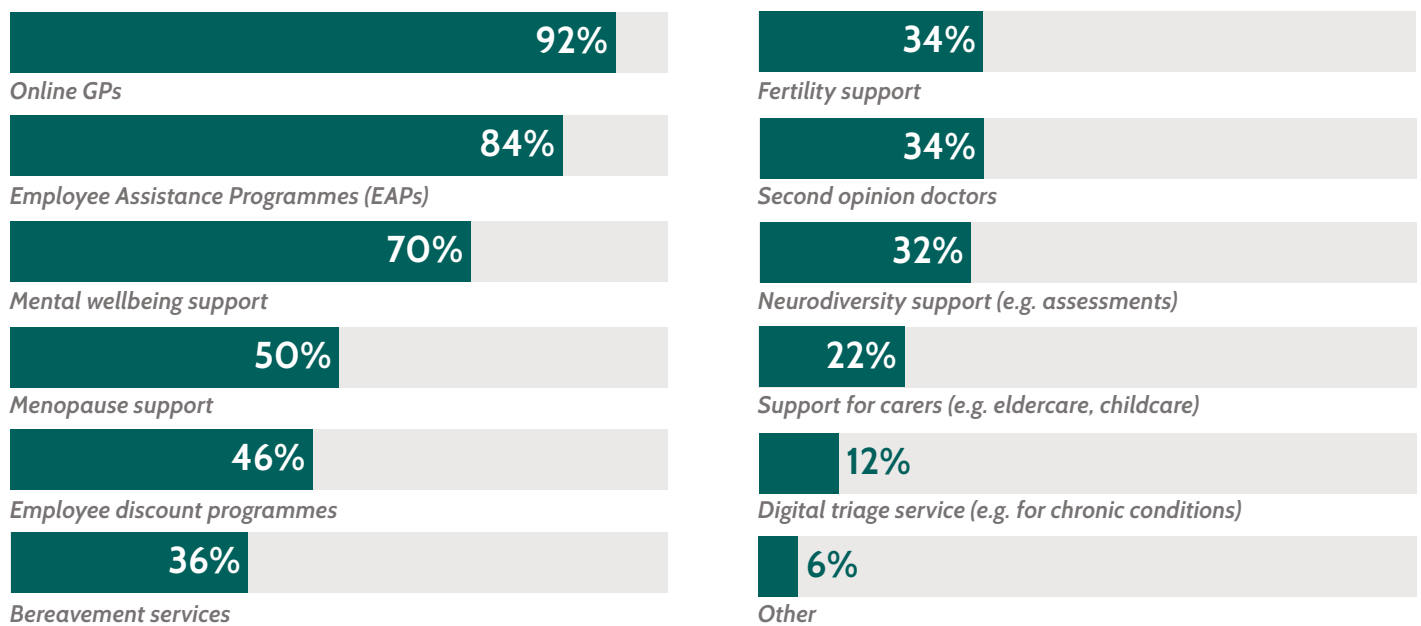


Attendees' Survey Findings

Attendees anticipate adjusting their spend in 2024/25 in the following ways

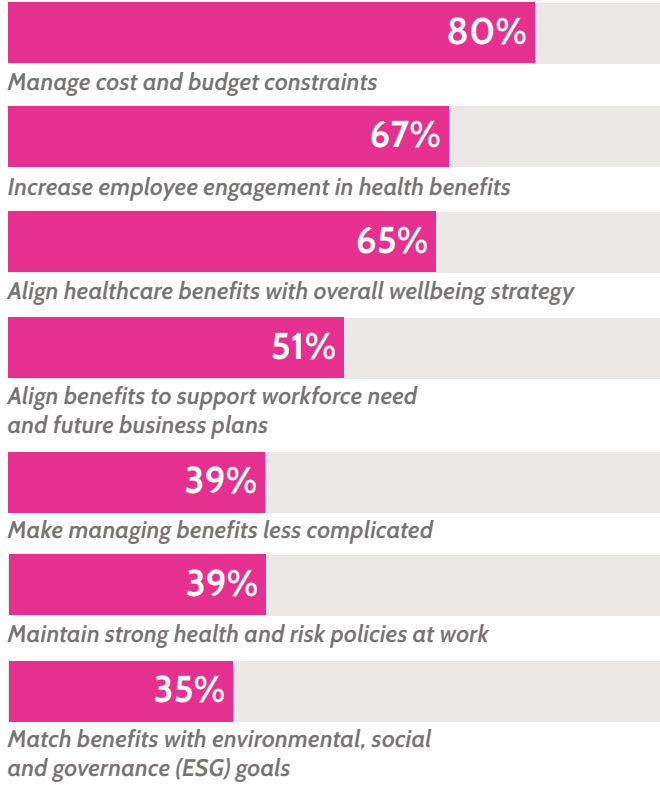


Attendees agree insurers' add-on benefits and support services are effective



Attendees' Survey Findings

The organisational challenges attendees are facing in 2024/25



How attendees are prioritising organisational challenges





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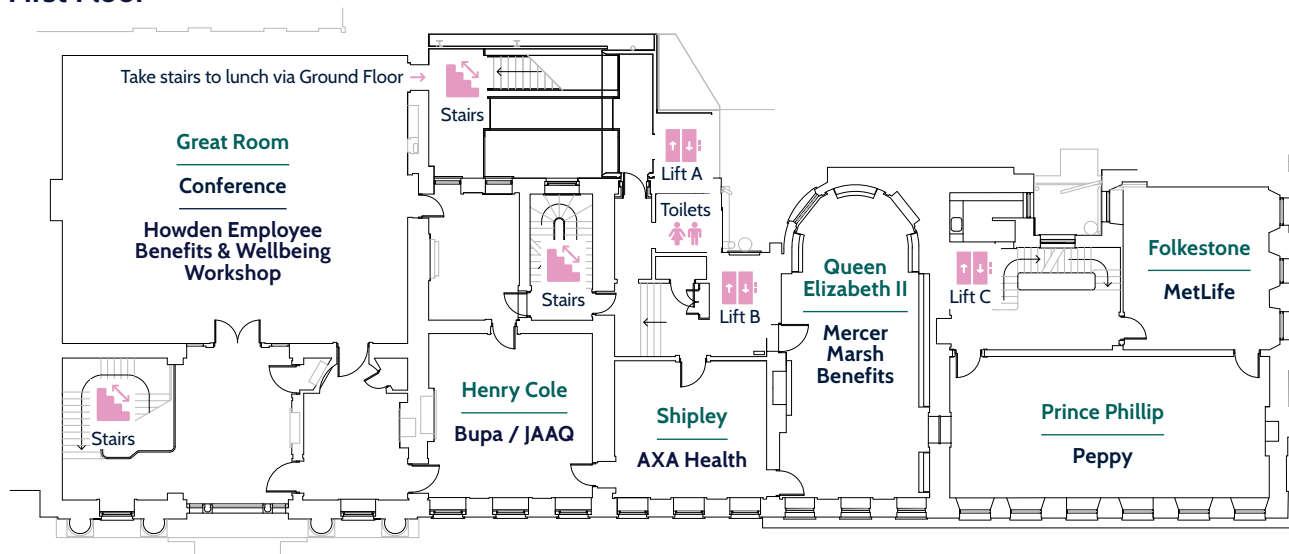




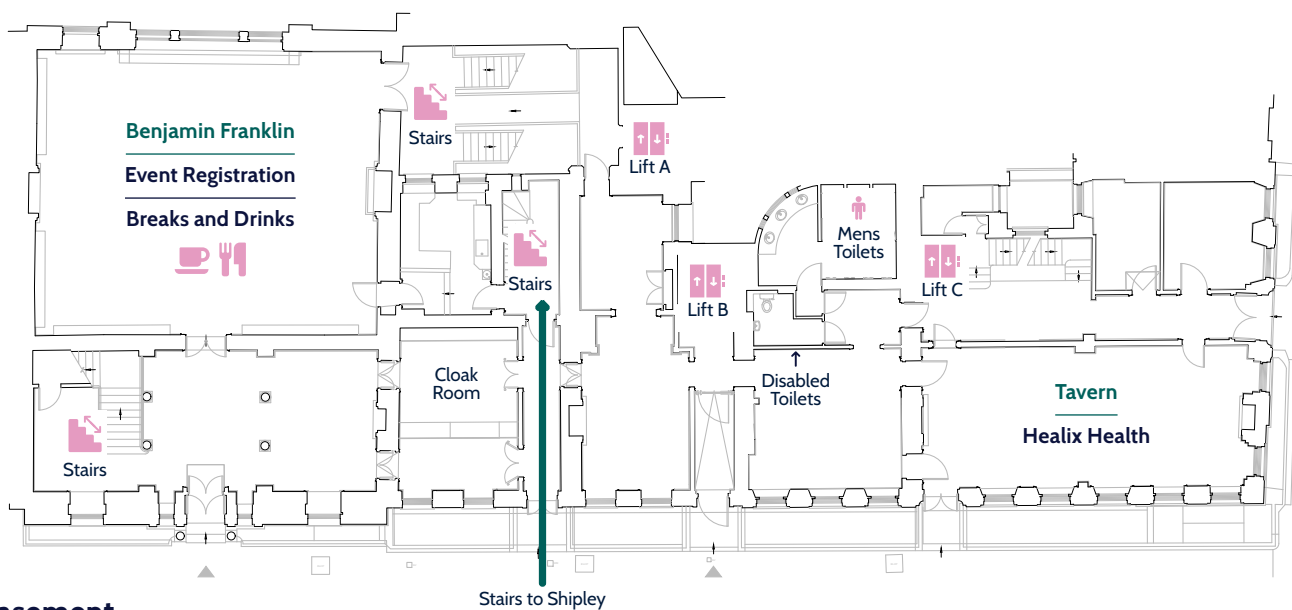
Floorplan

Royal Society of Arts (RSA), London

First Floor



Ground Floor



Basement

