

# ISI Unite 2026

From Investment to Advantage

September 23-25 | Toronto Marriott City Centre Hotel



ISI team members will be available throughout the conference for individual meetings, group discussions, and training sessions in dedicated breakout spaces. Please connect with your ISI representative to schedule a time.



Day  
1  
P.M.

## Wednesday, September 23

| Time        | Session                                                                              | Location                                              |
|-------------|--------------------------------------------------------------------------------------|-------------------------------------------------------|
| 5:00 - 7:00 | <b>Welcome Reception: An Evening to Connect</b><br><br>Presented by <b>Paymentus</b> | <b>Legends Lounge</b><br>Toronto Marriott City Centre |

Day  
2  
A.M.



## Thursday, September 24

| Time          | Session                                                                                                                                                                                                                                                                                                                                                          | Presenter                                                                                              |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| 8:00 - 9:00   | <b>Networking Breakfast</b>                                                                                                                                                                                                                                                                                                                                      |                                                                                                        |
| 9:00 - 9:30   | <b>From Investment to Advantage: ISI's Strategic Direction</b><br>Casey leads a panel discussion with ISI's leadership team on the company's strategic direction, evolving priorities, and what these investments mean for clients. The conversation will highlight where ISI is focused and how clients can turn technology investment into business advantage. | <b>Casey Kretz</b><br>Chairman   ISI<br><b>Doug Caccese</b><br>CEO   ISI                               |
| 9:30 - 10:30  | <b>What's Next for Insurance? A Conversation with Celent's Karlyn Carnahan</b><br>Hear from Karlyn as she explores the forces reshaping insurance, from evolving customer expectations and operational pressures, to the role of technology in helping insurers adapt, compete, and plan for what comes next.                                                    | <b>Karlyn Carnahan</b><br>Head of Insurance, North America   Celent                                    |
| 10:30 - 10:45 | <b>Morning Break</b>                                                                                                                                                                                                                                                                                                                                             |                                                                                                        |
| 10:45 - 11:15 | <b>AI in Production: Practical Applications for Insurance</b><br>Cam takes a practical look at how enterprise-grade AI is being applied across insurance workflows, with a focus on implementation, data quality, business adoption, and turning AI potential into operational value.                                                                            | <b>Cameron Scott</b><br>VP, Sales & Marketing   ISI                                                    |
| 11:15 - 12:00 | <b>From Priorities to Realization: Collaborating with ISI</b><br>Eva and Sarah share how ISI teams work with customers to keep priorities aligned, support requests visible, and projects moving forward. This session will highlight practical ways to strengthen communication, clarify next steps, and build momentum across day-to-day collaboration.        | <b>Eva Magulak</b><br>Manager, PMO   ISI<br><b>Sarah Halliwell</b><br>Manager, Business Analysis   ISI |



# ISI Unite 2026

## From Investment to Advantage

How Leading Insurers Align Platforms, People & Governance to Deliver Lasting Results

Day

2

P.M.



| Time         | Session                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                   | Presenter                                                                                                                    |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| 12:00 - 1:00 | <b>Networking Lunch</b>                                                                                                                                                                                                                                                                                                                                                                                               |                                                                   |                                                                                                                              |
| 1:00 - 1:45  | <b>Payments in Motion: Meeting Client Expectations Across the Insurance Lifecycle</b><br>Join this panel discussion with Invoice Cloud and Paymentus on evolving digital payment expectations. The conversation will cover adoption trends, client experience, operational considerations, and opportunities to make payments more connected, convenient, and efficient across the entire insurance lifecycle.        |                                                                   | <b>Moderator: Sarah Halliwell</b><br><br><b>Angela Abbott</b><br>VP, Alliances   InvoiceCloud<br><b>TBD</b><br>–   Paymentus |
| 1:45 - 2:15  | <b>Scaling What's Next: Cloud Innovation with AWS</b><br>Julian shares how ISI Core leverages AWS to support secure, scalable insurance operations. The session will explore how cloud infrastructure, analytics, and innovation can help insurers strengthen performance, flexibility, and long-term technology readiness.                                                                                           |                                                                   | <b>Julian Hall</b><br>VP, Technology   ISI                                                                                   |
| 2:15 - 2:30  | <b>Afternoon Break</b>                                                                                                                                                                                                                                                                                                                                                                                                |                                                                   |                                                                                                                              |
| 2:30 - 3:15  | <b>Building Agentic AI Solutions: Applying AI Responsibly in Insurance Workflows</b><br>Lawrence will explore what “agentic” means in production and how it differs from single-step AI. The session will share an insurance example built around document extraction and underwriting, while highlighting the orchestration, human oversight, evaluation, and guardrails needed to apply the technology responsibly. |                                                                   | <b>Lawrence Ngo, MD, PhD,</b><br>Founder & Principal   NGO<br>Consulting Partners                                            |
| 3:15 - 4:15  | <b>Commercial Lines Roundtable</b><br>Concurrent Session #1                                                                                                                                                                                                                                                                                                                                                           | <b>Professional Liability Roundtable</b><br>Concurrent Session #2 | <b>Moderator: Eva Magulak</b><br>Concurrent Session #1<br><b>Moderator: Cameron Scott</b><br>Concurrent Session #2           |
| 4:15 - 4:45  | <b>Policy Administration Roundtable</b><br>Concurrent Session #3                                                                                                                                                                                                                                                                                                                                                      | <b>Senior Leaders Roundtable</b><br>Concurrent Session #4         | <b>Moderator: Jevon Vandenberg</b><br>Concurrent Session #3<br><b>Moderator: Casey Kretz</b><br>Concurrent Session #2        |
| 4:45 - 5:30  | <b>Refresh, Recharge, and Catch-Up</b>                                                                                                                                                                                                                                                                                                                                                                                |                                                                   |                                                                                                                              |
| Time         | Session                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                   | Location                                                                                                                     |
| 5:30 - 7:30  | <b>Cocktail Reception</b><br>Join attendees at Amsterdam Brewhouse for cocktails, light refreshments, and relaxed networking before client dinners begin.                                                                                                                                                                                                                                                             |                                                                   | <b>Amsterdam Brewhouse</b>                                                                                                   |





# ISI Unite 2026

## From Investment to Advantage

How Leading Insurers Align Platforms, People & Governance to Deliver Lasting Results

Day

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A.M.



## Friday, September 25

| Time          | Session                                                                                                                                                                                                                                                                                                                                                                                                     | Presenter                                                                                                 |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| 8:00 - 9:00   | <b>Networking Breakfast</b>                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                           |
| 9:00 - 9:45   | <b>Connected Experiences Across the Insurance Lifecycle</b><br>Cam explores how portal, bordereau, direct, and CRM-connected experiences can help insurers support policyholders, brokers, and internal teams through more connected workflows.                                                                                                                                                             | <b>Cameron Scott</b><br>VP, Sales & Marketing   ISI                                                       |
| 9:45 - 10:30  | <b>Roadmap in Motion: What's Ahead for ISI Core, Portal, and AI</b><br>Jevon shares a forward-looking view of product direction across ISI Core, ISI Portal, and ISI AI, including key priorities, planned enhancements, and areas of continued investment.                                                                                                                                                 | <b>Jevon VandenBerg</b><br>Director, Product   ISI                                                        |
| 10:30 - 10:45 | <b>Morning Break</b>                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                           |
| 10:45 - 11:15 | <b>Operational Intelligence: Turning Insurance Data into Action</b><br>This session explores how ISI Analytics can help insurers turn operational data into clearer insight, better performance visibility, and more informed decision-making across the insurance lifecycle.                                                                                                                               | <b>Lee Parkinson</b><br>Principal Data Engineer   ISI<br><b>Frank Zillner</b><br>Lead Data Engineer   ISI |
| 11:15 - 11:45 | <b>AI-Enabled Development: Inside ISI's Product Innovation Approach</b><br>Ian shares how ISI is using AI within its solution development approach to support product innovation, delivery, and quality practices. The session will highlight how AI-enabled development is helping ISI teams work efficiently and responsibly while keeping reliability, client outcomes, and platform evolution in focus. | <b>Ian De Souza</b><br>VP, Development & Quality Assurance   ISI                                          |
| 11:45 - 12:00 | <b>Closing Remarks: Thank You and Continued Connection</b><br>A final close to recap key themes from ISI Unite, thank attendees for their participation and engaging discussions, and a look ahead to continued collaboration beyond the conference.                                                                                                                                                        | <b>Casey Kretz</b><br>President and CEO   ISI                                                             |

Day

3

P.M.



| Time         | Session                                                                                                                                                                                                                                                                                                          | Location                                        |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| 12:00 - 7:00 | <b>Post-Conference Networking, Catch-Up, and Recharge</b>                                                                                                                                                                                                                                                        |                                                 |
| 7:00 - 10:00 | <b>Optional   Take Me Out to the Ballgame: Blue Jays vs. Reds</b><br>Close out ISI Unite with a relaxed evening in a Rogers Centre Skybox as the Blue Jays face the Cincinnati Reds. It's an optional chance to unwind, enjoy the game, and spend time with fellow attendees and ISI staff after the conference. | <b>Marriott Toronto Skybox</b><br>Rogers Centre |



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## Make the Most of Your Time at ISI Unite

While in Toronto, we encourage you to connect directly with ISI team members, join breakout discussions, and take part in focused training or working sessions. Please connect with your ISI representative to schedule a time.



## Have Questions or Ideas to Share?

For questions about conference logistics, the agenda, sponsorship opportunities, or sharing a customer success story with your peers, please reach out to: [Jeff Kless, Marketing Manager](#) | ISI



## Thank You to Our Sponsors

We appreciate the support of our sponsors in helping create a valuable experience for the ISI customer community.

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