Alera EB -Strategy, Service and Sales 2026

April 7-9

Attendees will leave with:

- A clearer, more effective approach to delivering memorable, high-impact client support
- A stronger understanding of the biggest challenges employers are facing—including strategies that have worked, and those that have fallen short
- Insight into government policy changes that may influence benefits strategy and plan design
- Practical guidance on identifying and implementing advanced strategies, including direct contracting
- A better understanding of what private equity firms expect from employee benefits advisors
- A sharper perspective on when communication can deliver greater ROI
- Stronger peer relationships to support collaboration and drive better outcomes

Tuesday, April 7th

1:00-2:30	**Welcome and Introductions**
2:30-3:30	**Key Cost Drivers & Strategy Shifts** **Speakers: Kaycee DeGabriele and Shaun Sullivan** **Session Summary** This session will provide a focused overview of the major cost drivers that shaped employer health plans in 2025, based on Alera's, Vital Incite data. We'll compare these trends to prior years, highlight what changed, and discuss why certain cost pressures intensified. The session will also outline the strategies employers used to manage rising costs, what didn't work, and how these insights should inform our approach moving forward. **Key Takeaways** • Top 2025 Cost Drivers: Clear insight into the clinical, utilization, and market forces that most influenced plan spend. • Trend Shifts vs. Prior Years: How severity, frequency, drugs, and high cost- claim patterns evolved. • Effective Strategies: Which employer interventions meaningfully reduced cost or improved outcomes—and which lost impact. • Emerging Signals: What early indicators suggest about where health plan risks and opportunities are heading next.

	• Shared Foundation: A common understanding of the healthcare landscape to guide discussions throughout the meeting.
3:30-3:45	**Break**
3:45-4:30	**From Options to Outcomes: A Vision for a Simplified, Data Led Client Lifecycle** **Speaker: Brian Uhlig** **Session Summary** Time is the scarcest asset for our clients and our team. This session proposes a client lifecycle that replaces “shiny objects” and excess choice with clear, objective guidance and accountable follow through. We’ll show how to own the data end-to-end and communicate it through a concise, dashboard that blends leading and lagging indicators with a crisp “what we did” recap—so employers always know what to expect next and why. The result: fewer decisions for the client, more feedback on impact, and a team that operates as a trusted extension of theirs. **Key Takeaways** • How to communicate to develop Trust with a Repeatable Reporting • How to Reduce Cognitive Load: Curate, Don’t Catalog • Own the Objective Data to Demonstrate Fiduciary Value
4:30-5:00	**Bussin Benefits Communications** **Speaker: Chris Vaughn** **Session Summary** You rely on your relationships, integrity, knowledge, pricing and service to deliver for your clients. Find out how offering best-in-class benefits communication for your clients can be a differentiator for you, too. **Key Takeaways** • Why a communications strategy is fundamental to your success • Hear successful benefits communication case studies • Learn the importance of measuring and analyzing communication outcomes
5:00-5:30	**Key Sponsor Address- Spring Health**
6:30	**Dinner at Pins Mechanical (2nd Floor)**

Wednesday, April 8th

8:00- 9:00	**Breakfast**
8:30-9:10	**Make Clients Feel Taken Care Of: The Benefits Admin Playbook Advisors Can Actually Use**

	Speaker: Shane Brown **Session Summary** In this session, we'll break down the predictable moments when that noise spikes, what "effortless" looks like in real life, and a simple way to diagnose risk early and bring the right support in before small issues become big ones. **Key Takeaways** • The signals a client is heading toward frustration (and retention risk) before anyone says it out loud. • Questions that surface about where the breakdown is, without needing to be the tech expert. • What Alera resources can support your effort so share, and how we stay coordinated through implementation and ongoing support.
9:10- 9:30	**From Signals to Solutions: Introducing HR Support That Drives Client Success** **Speaker: Jessica Wobick** **Session Summary** In today's competitive labor market, attracting and retaining talent is critical—but many organizations are stretched thin on HR capacity and structure. In this session, we'll cover the key signals that a client may need additional HR support, when to bring in HR Consulting & Workforce Solutions, and how cross-sell partnerships have helped strengthen leadership practices, improve outcomes, and boost client retention. **Key Takeaways** • Spot the signals early: Learn how to recognize common indicators that clients may be struggling with HR capacity, structure, or strategy before those gaps impact performance and retention. • Know when and how to engage HR expertise: Understand when introducing HR support adds the most value and how to position it as a solution that strengthens workforce and leadership practices. • Leverage collaboration to drive outcomes: See how successful cross-sell partnerships have led to better client support, improved results, and stronger long-term client relationships.
9:30-9:55	**Indicators and Opportunities for Direct Contracting** **Speaker: Allison France and Mary Delaney** **Session Summary** Direct contracting can take many forms—from collaborative provider agreements that create mutual value to vendor-supported solutions. Some

	arrangements are billed directly to the health plan, while others require negotiation and coordination with carriers. This session steps outside traditional carrier offerings to highlight where direct contracting fits, what it takes to execute, and how it can improve both clinical outcomes and total cost. **Key Takeaways** • Identify the data signals that indicate when direct contracting is worth exploring. • Understand the range of models and entry points, from targeted agreements to broader provider partnerships. • Review real-world examples showing when direct contracting has produced meaningful employer results.
9:55-10:10	**Break**
10:10-11:00	**Direct Contracting Strategies That Win** **Speakers: Brant Couch and Scott Pruzan** **Session Summary** Direct contracting is rapidly reshaping the employer–provider landscape, creating new opportunities for smarter cost control, better care access, and deeper partnerships between healthcare providers and the businesses they serve. This session cuts through the noise to help benefit consultants understand when direct contracting makes strategic sense, how these arrangements actually work, and why employers are increasingly stepping outside traditional carrier pathways. Attendees will walk away with practical insight, real world perspective from both employer and provider, and clear guidance on how to lead clients into this evolving space with confidence. **Key Takeaways** • **Recognize the strategic triggers** that indicate when an employer is the right fit and ready to explore a direct contract with a healthcare provider. • **Understand different entry points and models** for direct contracting—from single-service agreements to comprehensive system-wide partnerships. • **Learn how to differentiate yourself from your competitors** by articulating the value, navigating complexities, and guiding clients toward high-impact healthcare provider partnerships.
11:00- 12:00	**Policy Headwinds and Key Compliance Considerations** **Speaker: Danielle Capilla** **Session Summary** Employers are operating in one of the most volatile benefits environments in decades, driven by accelerating healthcare costs, increased regulatory scrutiny, and heightened fiduciary expectations. Pharmacy is at the center of this

	pressure. Rising specialty drug spend, opaque PBM practices, and new federal oversight are fundamentally changing employer responsibilities. This session focuses on policy headwinds that are no longer theoretical, particularly the new PBM rules under the Consolidated Appropriations Act, and the practical compliance implications for employers, brokers, and consultants. The presentation will ensure colleagues understand where fiduciary risk is increasing, what questions must now be asked, and how employer decision-making must evolve. **Key Takeaways** • PBM contracts should be treated as fiduciary documents and reviewed accordingly. • Lack of transparency creates compliance and litigation risk, even if costs appear competitive. • Rebates, fees, and formulary decisions are plan assets and plan design decisions. • Choosing not to act is itself a decision that may be difficult to defend. • Compliance and cost strategy are now inseparable.
12:00- 1:30	**Lunch**
1:30- 2:00	**Employee Benefits and Retirement Due Diligence** **Speaker: Sara Carroll** **Session Summary** Introduction to Alera Group's Human Capital M&A Due Diligence Practice **Key Takeaways** • Team resources and roles – supporting production and retention through transaction due diligence • Pre-close due diligence scope and process • Outputs – financial pro forma, transaction analysis, employee impact assessment, and risk management • Post-close integration/harmonization and ongoing support for acquisitive clients
2:00- 2:20	**Financial Stewardship and Risk Oversight in Employee Benefit Plans** **Speaker: Harindra Sebastian** **Session Summary** How colleagues can leverage financial stewardship and risk oversight to strengthen their employee benefit strategy development for their clients. The session covers approaches to projecting plan costs, understanding and

	mitigating financial risk, and monitoring plan performance, helping us deliver enhanced strategic guidance and demonstrate real value to clients. **Key Takeaways** • How to help clients review and manage plan costs responsibly to meet long-term goals • How to advise clients on understanding financial risk and mitigating plan risk for self-insured health plans • Understand how taking a long-term focus can impact program advisor's guidance and benefit strategy development
2:20-3:00	**Improving Client Support and Driving Improved Outcomes: Improved Carrier Contracting and Oversight of High-Cost Claimants** **Speakers: Ashley Berry and John Delaney** **Session Summary** This session will explore how employers can strengthen fiduciary oversight and drive better financial and clinical outcomes through proactive carrier contracting, payment integrity governance, and high-cost claimant management. Participants will learn why active engagement, transparency, and documentation are critical under ERISA, how the RFP and ASA negotiation process creates leverage to uncover hidden fees and conflicts of interest, and how clinical high-cost claimant reviews translate complex claims data into actionable insights that support budgeting, stop-loss strategy, and care coordination. **Key Takeaways** • Fiduciary duty requires active oversight—not passive reliance on carriers or TPAs • Learn how to leverage the RFP and ASA negotiation process to become your single greatest leverage point for transparency • Shared savings and payment integrity programs can significantly increase true plan costs • Clinical high-cost claimant reviews turn claims data into actionable strategy • Effective fiduciary governance is not a one-time event—it requires an ongoing process of evaluation, reporting, and refinement to manage risk and improve outcomes year over year.
3:00-3:15	**Break**
3:15- 4:00	**Leverage Data to Identify the Correct Vendor** **Speakers: Sophia Fox and Andrea Lausch** **Session Summary** A fast, data-driven review of the outcomes delivered by a variety of vendors—highlighting who is producing real value, where results are falling short, and what this means for employer strategy.

	Key Takeaways • Vendor results across DPC, cardiometabolic and MSK • Who is delivering measurable impact—and who isn't • What differentiates strong vendor performance • Why performance goals and guarantees must be built into every strategy
4:00-5:00	**Sponsor Vendor Presentations**
5:00-6:00	**Happy Hour at Bottleworks (The Lab)**
7:00-9:00	**Dinner at Commission Row (The Pennsylvania Room)**

Thursday, April 9th

8:00-9:00	**Breakfast**
8:30-9:30	**Shift in the PBM Market** **Speaker: Carrie Mueller** **Session Summary** This session gives an outside perspective on how the pharmacy benefit manager market is changing and what it means for employer plan sponsors. It will explain the practical implications of the Federal Trade Commission's activity, why the largest pharmacy benefit managers struggle to change their own incentives, and how outcomes differ between traditional models and newer transparent approaches. The session also highlights how formulary decisions, stronger clinical criteria, and enforcement can materially affect both cost and results—and what to watch for when evaluating pharmacy benefit manager performance and contracting tactics. **Key Takeaways** • What the FTC action really means for plans sponsors & why its difficult/impossible for the large PBMs to disrupt themselves • Comparing outcomes from traditional models (e.g. big 3) to innovative transparent models including: 1. Thinking differently about formulary (e.g. anti-inflammatory) 2. Importance of strong clinical criteria and enforcement (e.g. GLP-1s) 3. Financial outcomes/case studies and games PBMs can play
9:30-9:45	**Break**
9:45-10:30	**Pharmacy Trends, Influencers and Strategies** **Speakers: Kaycee DeGabriele and Kevin Gregory** **Session Summary** This session reviews the most impactful pharmacy trends from the past year, highlighting what drove changes in utilization and cost across key drug categories. Speakers will examine which pharmacy strategies delivered results, which

	underperformed, and why. The discussion will conclude with practical guidance on how employers can anticipate emerging risks and prepare for what's ahead. **Key Takeaways** • Know what's driving pharmacy trend. Distinguish utilization, drug mix, and pricing impacts to avoid chasing the wrong levers. • Separate effective strategies from noise. See where common pharmacy approaches delivered value—and where they fell short. • Anticipate what's coming next. Understand emerging risks and market shifts shaping future pharmacy costs. • Act with clarity. Leave with concrete steps to strengthen pharmacy oversight and prepare for the year ahead.
10:30-12:00	**Alera Best Next Steps- Group Think Tank** **Session Summary** This is where we turn the conference insights into an actionable plan. We'll break into small groups to dig into the biggest opportunities and friction points we're seeing across strategy, service, and sales—then translate them into clear next steps. Each group will identify the key indicators that should trigger action, the best approaches to address them, and new strategies we can deploy immediately. We'll reconvene to share outputs and align on a practical, prioritized set of "best next steps" the team can carry forward—so everyone leaves with clarity, ownership, and momentum.
12:00-1:00	**If staying, lunch on your own**
1:00-3:00	**VIST Tool Training**