

INNOVATIVE BENEFIT PLANNING PRESENTS



BECOME AN EMPLOYER OF CHOICE

Dear friends,

Welcome to Innovative's Summit focusing on building a successful culture and increasing engagement in your organization.

The Innovative Summit is a training event dedicated to helping you learn how to transform your workplace into a hub of engagement, satisfaction, and success. This summit aims to equip you with the tools and knowledge needed to create a more robust and effective organizational culture.

We would like to congratulate all of you for coming together to learn, share, and explore the latest trends in culture building and engagement.

We look forward to you learning from our keynote and speakers who are industry thought leaders. We encourage you to network with other employers who are in different phases of their journeys and may have something valuable to share.

This year's summit will include inspirational sessions that will provide tangible takeaways including an informative and engaging DISC session. There will be a variety of topics discussed, such as improving culture in the workplace, enhancing your teams, and building a culture that embraces and fosters a sense of psychological safety. Our goal is to provide employers with resources and tools to return to their workplace feeling inspired and ready to make effective and lasting changes.

Please be sure to explore our health fair to learn about the latest resources to enhance employee health.

About Innovative Workplace Wellness

Innovative's workplace wellness assists employers in creating a culture of health. Our skilled wellness team works hand-in-hand with organizations to design and implement customized wellness programs that improve your population health and ultimately lower claims costs.

We help employers focus on each individual employee, guiding your team to effectively manage their own mental, physical, and emotional energy so your employees and your business thrive.

Warmly,

The Innovative Team



AGENDA

10:30 - 11:00 am

Registration/Vendor Fair

Breakfast will be served and time to visit with vendors.

11:00 - 11:30 am

Morning Meditation & Breathwork

Meditation4Leadership

11:30 - 12:30 pm

How to Drive Culture. *Intentionally.*

Speaker: Bill Kaiser

12:30 - 1:30 pm

Lunch/Networking/Vendor Fair

Lunch served and time to visit with vendors.

1:30 - 2:30 pm

Building Trust and Innovation in Teams

Speaker: Elizabeth Finkle

2:30 - 3:00 pm

Break/Vendor Fair

3:00 - 4:00 pm

DIScovering Culture: Driving Growth Through Behavioral Insights

Speaker: Ryan Skimmons

4:00 - 4:15 pm

**Closing Remarks/Raffle Winners/
Vendor Fair**

We will announce our raffle winners from the day

4:15 – 5:30 pm

Happy Hour

MEET OUR KEYNOTE SPEAKER



Bill Kaiser

“How to Drive Culture. *Intentionally.*”

Bill Kaiser is Senior Vice President of CultureWise®. CultureWise® helps organizations create, drive and maintain high performing cultures, with a proven system that's straightforward, practical, and easy to use. He works with CEO's of many diverse industries. Prior to CultureWise®, Bill was a partner at RSI, an employee benefits consulting firm. The firm won numerous Best Places to Work awards in the Philadelphia Region as well as NJ. In 2006 RSI earned the NJ Governor's Award for Performance Excellence - Gold Level, the highest award for total quality available in the state. In 2008, RSI became a division of Arthur J. Gallagher & Associates (AJG), one of the largest insurance brokers in the world. Bill served as Regional Sales VP and Area President for Gallagher until he joined CultureWise® in 2015. Today, Bill's a frequent Vistage and keynote speaker as well as seminar leader on leadership, organizational culture, and building high performance teams. He has worked with over 1000 CEOs throughout North America. He received his Bachelor of Science in Business and Economics from Lehigh University and completed the Program for Manager Development at Duke's Fuqua School of Business. Bill is married with 4 children, 6 grandkids (and counting!) and resides in Southern New Jersey.

ADDITIONAL SPEAKERS



Elizabeth Finkle

“Building Trust and Innovation in Teams”

Meet Elizabeth Finkle—more than a seasoned organizational health expert with 20 years of experience; she’s a dynamic leader dedicated to enhancing organizational effectiveness through a holistic approach to employee health. As a loving mom to four, a passionate health equity advocate, and an outdoor enthusiast, Elizabeth brings her vibrant energy and core values into every aspect of her work. What truly sets Elizabeth apart is her exceptional ability to cultivate authentic connections and drive organizational change. She understands that building a healthy workplace goes beyond physical wellness—it’s about creating a culture of engagement, collaboration, and meaningful relationships that elevate organizational performance. Her mission is to design environments where people thrive, connect deeply, and perform at their best. Elizabeth’s expertise spans a wide array of settings, including hospitals, health insurance companies, national sports teams, manufacturing sites, and higher education at the University of Delaware. Across these industries, she has consistently delivered results by integrating wellbeing strategies with organizational goals, enhancing both employee satisfaction and business outcomes. Elizabeth’s superpower lies in her people-centric approach to organizational effectiveness. She simplifies complex challenges, aligns teams, and fosters a culture of continuous improvement, enabling organizations to navigate change and drive success. As a proven leader in organizational health initiatives, employee experience design, strategic program planning, and professional development, she excels at creating impactful solutions that resonate.

ADDITIONAL SPEAKERS



Ryan Skimmons

“DISCovering Culture: Driving Growth Through Behavioral Insights”

Ryan Skimmons, MS is an accomplished training facilitator and coach with extensive experience in the healthcare, hospitality and behavioral health industries. Certified in DISC, Ryan specializes in leadership development, team building, and fostering effective communication within organizations. He is known for creating tailored, high-impact training programs that drive measurable improvements in performance and collaboration.

A notable achievement in Ryan’s career is the design and implementation of the first-ever mental health co-responder training program for the Philadelphia Police Department, which has set a new standard for law enforcement and mental health collaboration. His expertise in instructional design and behavioral coaching positions him as a leader in advancing professional development in diverse environments.

WELLNESS SUMMIT RAFFLE

Innovative Benefit Planning is happy to offer a friendly game to have some fun and win prizes. Compete with other attendees by filling up your bingo card to be entered into the raffle.

How to play:

1. Visit every vendor table during our health fair.
2. While at the table, using the ink bottle to “blot” the vendor space on your bingo card.
3. Fill up your entire board, and exchange it for raffle tickets.
4. Drop your raffle tickets into the box of your choosing.
5. Wait for your name to be called at the end when we announce raffle winners!



Name: _____

STOP BY AND SEE OUR VENDORS!
Fill all your stamps and enter to win one of four raffle prizes.

B	I	N	G	O
Marathon Health	imagine360	BPAS	AmeriHealth Administrators	DELTA DENTAL
BENECON	MENTATION + LEADERSHIP	Marathon Health	Guardian	FREE
US-Rx Care	luminare health Experience. Solutions. Results.	ATP ANALYTICAL TECHNOLOGIES	Paycor	CENTIVO
FREE	State of Ohio's Health Services, Inc. New Jersey	MY SAVOY BENEFITS GROUP	RxBenefits	aetna
Magellan HEALTH	Fidelio Dental Insurance	ECOSYSTEM	WONDERPAD	NEW LIFE
RXnGO	QUANTUM	ASP	personify	Plymouth Rock



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With Innovative: Benefits Are A Piece Of Cake



Ingredients:

- **Create an engaged workforce**
- **Identify & eliminate waste within your benefits package**
- **Ease the HR admin burden**
- **Experience a complete compliance resource**

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FACT: The PBM Landscape is Shifting.

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Contact Information:
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Your greatest asset is a healthy workforce

AmeriHealth Administrators is proud to support Innovative's Annual Well-Being @ Work Summit. We recognize Innovative Benefit Planning for its commitment to promoting healthier workplaces.



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Advanced Primary Care

by Marathon Health



Access to quality care is more important than ever, but many in your workforce don't have a primary care doctor.

One-fourth of U.S. adults, and almost half of adults under 30, don't have a primary care doctor (according to KFF). Marathon Health changes that with our advanced primary care model, focusing on personalized, holistic care and seamless navigation.

We exist to enable people to live their healthiest lives and are staffed based on the needs of your workforce. Our care access channels include network, onsite, nearsite, and virtual, ensuring convenient care access for all types of workforces. Plus, our care teams excel at engaging people to help them make healthy lifestyle changes.

Our care model

Our value-based care model prioritizes patient engagement, offering three times more time with a provider. We provide treatment, coaching, and support to help patients take control of their health.

With our providers by their side, patients become more involved in their healthcare. Our care team collaborates to provide ongoing preventive care, sick care, condition management, and more, driving better outcomes and helping patients live healthier lives.

95%

of patients rate providers as good or excellent










59%

of high-risk patients make improvements on clinical quality health measures

\$1,800

average annual savings per engaged patient

Some of our primary care services

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GET INFORMED, INSPIRED AND ENGAGED

Innovative is proud to be committed to professional development through a variety of seminars, webinars, and events all year long.

Explore our list of upcoming programs at:

ibpllc.com/events