



Decades of business traditions and technology environments are being challenged by a fast changing world – one that is unfolding faster than we realize or are currently prepared for. Solution providers are turning to SMA as a trusted advisor to understand key business and technology trends and align their offerings and market messaging to better support their customers.

SMA Offerings

If your goal is to expand your footprint in the insurance industry by developing and launching solutions that meet the industry's needs and priorities, we'll help you get there. Our actionable insights and unique forward-thinking offerings create an unrivaled set of services that support solution providers' needs and help them position for success in the insurance industry today and in the future.

Retainer

- Real-Time Advice
- Strategy Sessions
- Speaking Engagements
- Quarterly SMA Webinars
- Access to Published and Unpublished Research

Research

- Syndicated Reports
- Custom Research Projects, Branding, and Multi-client Studies

Events

- SMA Summit
- Innovation Awards
- Speaking Engagements – User Conference Keynotes, Webinars, Executive Roundtable Facilitation, etc.

Consulting

- SMA Branded Marketing Artifacts – Perspectives, ViewPoints, Case Studies, SnapShots, Whitepapers
- Market Sizing
- Competitive Intelligence
- Product Roadmap
- Insurance Value Proposition and Market Message Development Assistance
- Sales Training

InsurTech*

- Innovation Ecosystem & Communities - Tracking InsurTech & Emerging Trends
- Next-Gen Workshops - InsurTech, Digital, and Innovation & Emerging Technology

* Note: Innovation offerings are only available to full advisory clients

About SMA

Strategy Meets Action (SMA) is a leading strategic advisory services firm exclusively serving the insurance industry. Working with both business and technology leaders, we are a trusted and valued advisor to hundreds of companies and an instrumental influencer across the industry. SMA, a Boston-based firm founded in 2007, offers consulting and advisory services for the Property and Casualty and Life and Annuities companies, as well as the technology, data, services, and solution providers that support it.

SMA Partners

Deb Smallwood, *Founder*
Mark Breeding, *Partner*
Karen Furtado, *Partner*
Karen Pauli, *Principal*

Contact Us

Deb Smallwood at 603.770.9090 or dsmallwood@strategymeetsaction.com



[sma-strategy-meets-action](https://www.linkedin.com/company/sma-strategy-meets-action)

[SMAInsurance](https://twitter.com/SMAInsurance)

SMA Partners

Deb Smallwood - Founder

dsmallwood@strategymeetsaction.com • [@dmsmallwood](https://twitter.com/dmsmallwood)

Deb Smallwood, the Founder of SMA, is highly respected throughout the insurance industry for strategic thinking, thought provoking research, and advisory skills in helping insurance companies re-think, re-energize, and re-tool their IT plans and technology investments for profitable growth and differentiation. Insurers and solution providers turn to Deb for insight and guidance on business and IT linkage, strategy, and architecture. Those seeking an edge in today's highly competitive world turn to Deb to capitalize on her deep industry knowledge and experience and her specialized understanding of distribution, portals, agent connectivity, and underwriting automation.

Deb has held leadership roles in premier insurance companies, professional services firms, and research advisory organizations, where she consistently demonstrated the ability to find new ways to leverage technology to achieve optimal business outcomes. Her skill set includes linking business strategy to IT strategy; development of business and IT roadmaps; selecting, shaping, and delivering core solutions; and the implementation of right-sized governance models.



Mark Breading – Partner

mbreading@strategymeetsaction.com • [@BreedingSMA](https://twitter.com/BreedingSMA)

Mark Breading, a Partner at SMA, is a recognized expert in advanced technologies and their implications for the insurance industry. His specialty areas include the customer experience and analytics. He has exceptional knowledge and experience in many dimensions of the customer/producer experience, including omni-channel, customer communications, mobile technologies, CRM, digital content management, and contact centers. He has broad experience and insights including business intelligence, advanced analytics, and big data.

Mark has over 30 years of insurance and information technology experience in a variety of leadership roles. Mark is well known for his perspectives on innovative uses of technology in insurance and the future of the insurance industry. Mark leads the research program at SMA, and has exceptional knowledge and experience in all aspects of advanced technologies and solutions that provide value across the insurance enterprise – including analytics, customer communications, enterprise content management, telematics, and mobile technologies.



Karen Furtado - Partner

kfurtado@strategymeetsaction.com • [@karenmfurtado](https://twitter.com/karenmfurtado)

Karen Furtado, a Partner at SMA, has an exceptional understanding of core systems in insurance and the transformations required to achieve success. Her expertise is comprehensive – policy administration, rating, product configuration, billing, and claims – and is combined with a deep understanding of how to integrate mature and emerging technologies with core systems. Those seeking an edge in today's highly competitive world turn to Karen to capitalize on her unparalleled knowledge and experience in connecting solutions to business and IT requirements.

Karen has focused her entire career on solving core issues through the application of modern technology and has unparalleled knowledge in mapping solutions to business requirements and IT needs. Her 25+ years of technical and business experience within the insurance industry, with specific focuses in core system modernization and optimization, complex system implementations, vendor selection, project management, application development, and business process and technical outsourcing, have uniquely qualified her for her current position at SMA.



Karen Pauli - Principal

kpauli@strategymeetsaction.com • [@kpauliSMA](https://twitter.com/kpauliSMA)

Karen Pauli, Principal at SMA, has comprehensive knowledge about how technology can drive improved results, innovation, and transformation within insurance operations. Karen has worked extensively with insurers and technology providers to reimagine processes and procedures to change business outcomes and support evolving business models. Her areas of focus include underwriting, claims, business intelligence and analytics, data sources, agency distribution, and customer management. Karen's real-world experience with digital transformation projects has given her unique insight into the changing customer and distributor experience in the digital age.

In her more than 25 years at insurance companies, and in the technology research and advisory space, Karen has developed her talent for aligning business goals and perspectives with technology roadmaps to create competitive advantage.



Strategy Meets Action • 75 Arlington Street – Suite 500 • Boston, MA 02116 • www.strategymeetsaction.com

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