



IBAO AWARDS OF EXCELLENCE 2019

IBAO CONVENTION

OCTOBER 23-24 • SHERATON CENTRE TORONTO

STRONGER
TOGETHER

ibao



APPLICATION DEADLINE - AUGUST 24

best in class performance

Top insurance professionals are pacesetters. They're best in class performers who deserve recognition. We proudly celebrate their achievements with our annual IBAO Awards of Excellence. If you're an outstanding member of the broker community or know a broker who deserves recognition, send in a nomination.

and the winner is...

PANEL OF JUDGES

Nominees are evaluated by an independent panel that recognize best in class performance when they see it. This year's panel includes business leaders and industry partners who will be evaluating specific criteria outlined within each application form. Use your entry to tell a story—narrative is a critical evaluation tool for this year's judges.

GUIDELINES

- Each answer should be no less than 450 words
- Winning submissions include photos, links, examples, blogs, industry press, etc.
- Video submissions are encouraged
- The more creative, the better
- Email submissions by August 24th to Tahnee — tmalazdrewicz@ibao.on.ca

BENEFITS

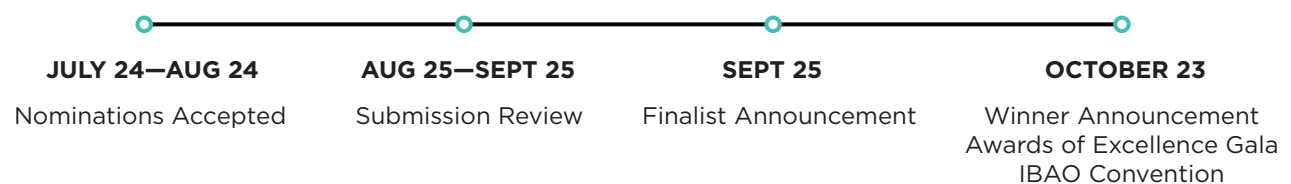
Winning an IBAO Award of Excellence is advantageous for both your personal and professional brand. It enhances your business profile and creates opportunities for marketing and promotion, business development and attracting talent to your brokerage.

Every winner receives a professional photo shoot, appears on the cover of The Ontario Broker magazine and has their success story shared in a feature spread. Finalists and winners are recognized in press releases to industry media, members and industry stakeholders leading up to and following the Awards Gala.

New This Year! We're upping the ante with prizes of up to \$5,000 in value.



TIMELINE



AWARDS OF EXCELLENCE GALA

The broker community comes together to honour Awards of Excellence finalists and winners every year at our IBAO Convention—this year October 23rd in Toronto. Family, friends, colleagues and supporters are invited to join the celebration of winners and the success of Ontario's broker channel.

brokerage of the year – 10 licensed brokers and under

ELIGIBILITY:

- Principal Broker/Senior Management cannot be a member of the IBAO Executive/Board of Directors
- Brokerage must belong to their local Affiliate

BROKERAGE NAME

BROKERAGE ADDRESS

BROKERAGE PHONE NUMBER

BROKERAGE WEBSITE

BROKERAGE SOCIAL MEDIA CHANNELS / HANDLES / HASHTAGS

YEAR THE BROKERAGE WAS FOUNDED

OF EMPLOYEES

1. How has your brokerage improved internal workflows and adopted new business practices to achieve long-term growth (i.e. technology enhancements, office efficiencies, staffing, recruitment, etc.)?
2. How is your brokerage creating a positive and vibrant office culture (i.e. performance management systems, employee training and development, young broker empowerment, staff retention, working towards a common goal, staff events, etc.)?
3. How has your brokerage adopted tools and practices that appeal to changing consumer preferences and demographics (i.e. web and social media presence, customer outreach and communications, advertising, automation, charitable giving, etc.)?
4. How has your brokerage demonstrated strong operational performance (i.e. specific actions/strategies that create measurable internal efficiency gains, new customers, customer retention, growth percentage by policy/premium, overall profitability/financial stability, etc.)?
5. How has your brokerage demonstrated an unwavering focus on the customer (i.e. YELP, Google Reviews, NPS, etc.)?

brokerage of the year – over 10 licensed brokers

ELIGIBILITY:

- Principal Broker/Senior Management cannot be a member of the IBAO Executive/Board of Directors
- Brokerage must belong to their local Affiliate

BROKERAGE NAME

BROKERAGE ADDRESS

BROKERAGE PHONE NUMBER

BROKERAGE WEBSITE

BROKERAGE SOCIAL MEDIA CHANNELS / HANDLES / HASHTAGS

YEAR THE BROKERAGE WAS FOUNDED

OF EMPLOYEES

1. How has your brokerage improved internal workflows and adopted new business practices to achieve long-term growth (i.e. technology enhancements, office efficiencies, staffing, recruitment, etc.)?
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4. How has your brokerage demonstrated strong operational performance (i.e. specific actions/strategies that create measurable internal efficiency gains, new customers, customer retention, growth percentage by policy/premium, overall profitability/financial stability, etc.)?
5. How has your brokerage demonstrated an unwavering focus on the customer (i.e. YELP, Google Reviews, NPS, etc.)?

young broker of the year

ELIGIBILITY:

- Must be employed at a brokerage that is a full voting member of the IBAO and belongs to their local Affiliate
- Must be under 40 years of age or have less than 5 years' experience with a RIBO license
- Must NOT be a member of the IBAO Executive/Board of Directors (YBC Council Team Leads are eligible to apply)

NOMINEE NAME

NOMINEE TITLE

NOMINEE EMAIL

NOMINEE PHONE NUMBER

NOMINEE BUSINESS ADDRESS

BROKERAGE NAME

BROKERAGE WEBSITE

BROKERAGE SOCIAL MEDIA ACCOUNTS (SPECIFIC TO THE BROKER IF POSSIBLE)

OF YEARS AT CURRENT BROKERAGE

OF YEARS IN THE INDUSTRY

DESIGNATIONS

INDUSTRY OR IBAO COMMITTEES (NATIONAL, PROVINCIAL, AFFILIATE)

1. How is this Young Broker helping to inspire and implement new approaches within the brokerage and broader insurance industry?
2. How does this Young Broker set high customer service standards, inspire their peers, invest in continuous education and give back to their community?
3. How has this Young Broker established their personal brand (i.e. how do they articulate their value proposition, how are they recognized as an expert in the field, how do they leverage a consistent image and message across platforms, how have they advanced their career, etc.)?
4. How does this Young Broker demonstrate a strong record of adding value to corporate strategy (i.e. specific actions/strategies that create measurable internal efficiency gains, number of clients/policies, customer retention, growth percentage by policy/premium, etc.)
5. How has this Young Broker gone above and beyond to help their clients?

innovation of the year

ELIGIBILITY:

- Any brokerage, broker, group of brokers, insurance company, insurance professional or industry partner/vendor that has advanced and/or made a positive impact on the broker channel through a specific opportunity, innovation, project or initiative

***Non brokers eligible to apply

NOMINEE(S) NAME(S)

BROKERAGE OR BUSINESS NAME

BUSINESS ADDRESS

BUSINESS PHONE NUMBER

WEBSITE

SOCIAL MEDIA CHANNELS / HANDLES / HASHTAGS

1. What new innovative idea, business model, initiative or campaign has been developed and implemented to make a positive impact on the broker channel? What was the source of the idea?
2. How has the initiative impacted the industry in a positive way (i.e. reduced costs, increased market exposure, attracted new markets, created efficiencies, solved a problem, inspired change, etc.)?
3. How has the initiative been adopted, embraced, been proven effective and shown growth (i.e. web stats, sales rates, customer reviews, SEO rankings, etc.)
4. What's the plan for future growth? Does the initiative demonstrate a clear and sustained capacity for success in the insurance market place?
5. Describe any significant obstacles the innovation had to overcome in order to be successful.

affiliate of the year

AFFILIATE NAME

AFFILIATE PRESIDENT NAME

MEMBERS OF AFFILIATE BOARD OF DIRECTORS

AFFILIATE BUSINESS ADDRESS

AFFILIATE WEBSITE

AFFILIATE SOCIAL MEDIA ACCOUNTS

AFFILIATE EDUCATION PROGRAMS

1. Describe the quality of Affiliate meetings and events:
 - Attendance levels
 - Featured speakers and topics
 - Frequency of meetings/events
 - Social/fun/innovative aspects that foster the broker network and establish a sense of community
2. How does the Affiliate communicate with its members, what types of content are shared, what channels are used to get the message out and how effective are they (i.e. open rates, social engagement, growth, etc.)? How are membership levels maintained and new members brought on board?
3. How has the Affiliate integrated Young Brokers, and as a result of these efforts, what evidence of increased industry engagement can be shared?
4. How has the Affiliate helped promote Ontario's broker channel, its local brokerages and broker professionals, and the broker value proposition?
5. What efforts has the Affiliate made with respect to political advocacy and involvement?
6. What strategies has the Affiliate implemented to ensure the future sustainability of the organization?