



IBAO CONVENTION

COME TOGETHER
CANADA 150 OCT 25-26

IBAO AWARDS OF EXCELLENCE 2017



DEADLINE TO APPLY
September 15TH, 2017

CONTACT

BRETT BOADWAY | BBOADWAY@IBAO.ON.CA



TOP INSURANCE PROFESSIONALS ARE PACE SETTERS.

They're best in class performers who
deserve to be recognized.

We proudly celebrate their achievements
with the IBAO Awards of Excellence.

If you're an outstanding member of the
broker community or know a broker
who deserves recognition, send us a
nomination.



AND THE WINNER IS...

PANEL OF JUDGES

Nominees are evaluated by an independent panel who understands what really matters to consumers and know best in class business practices when they see them. This year's panel includes:

- Insurance company representatives
- A general consumer
- A business leader outside of the industry

BENEFITS

- Media exposure!
- An enhanced business profile
- Business development opportunities
- Enhanced recruitment
- An award to display across marketing platforms
- An invitation to the 2017 Awards of Excellence Gala October 25th in Ottawa

AWARDS GALA

The broker community comes together to honour Awards of Excellence winners every year. We're celebrating this October 25th at our 2017 Awards of Excellence Gala during Convention at the Shaw Centre in Ottawa. Family, friends, colleagues and supporters are invited to join the celebration of winners and the success of the broker industry.

GUIDELINES

FORM

Extract the page that correlates to the award you're submitting a nomination for fill out the required fields and save.

Q+A

Answer six questions (ALL questions in Part One; two questions from Part Two – your choice). Each answer should be minimum 250 words. You also have the option to submit a video testimonial instead of a written Q+A. In either case, narrative is a critical evaluation tool for the panel of judges, so take the opportunity to tell your story.

PROCESS

Email the completed form, Q+A and any relevant communication (i.e. thank you cards, emails, etc.) and promotional material that helps build your case to Brett Boadway – bboadway@ibao.on.ca. Deadline for submission is September 15th, 2017 @ 5:00 p.m.

AUGUST 16 – SEPTEMBER 15, 2017

NOMINATIONS ACCEPTED



SEPTEMBER 15–22, 2017

ROUND 1 – WRITTEN SUBMISSION

Submissions are reviewed by our judging panel and answers to each question are awarded a score:

- 5 = Top Tier
- 4 = Very Good
- 3 = Good
- 2 = Not Ready for Top Tier Recognition
- 1 = Doesn't Have Top Tier Practices

The 3 point earners from each category will be recognized at the IBAO Awards of Excellence Gala.

ROUND 2 – INTERVIEW

- IBAO hosts the judging panel
- Nominees are called for an interview (phone call is recorded)
- Submissions/interview answers are debated
- A winner is determined



SEPTEMBER 29, 2017

The top 3 candidates are recognized in a press release.



OCTOBER 25, 2017 | IBAO 97TH ANNUAL CONVENTION

The top 3 candidates are invited to attend the IBAO Awards of Excellence Gala at the Shaw Centre in Ottawa.



POST CONVENTION

Winners are formally announced in a press release to industry media; the release is distributed within the broker community.



2018

Winners are featured in The Ontario Broker magazine.

BROKERAGE OF THE YEAR



ELIGIBILITY

Brokerage must be a full voting member of the IBAO and belong to their local Affiliate; the Principal Broker or member of Senior Management cannot be a member of the IBAO Board of Directors or Executive.

BROKERAGE NAME

BROKERAGE ADDRESS

BROKERAGE PHONE NUMBER

BROKERAGE WEBSITE

BROKERAGE SOCIAL MEDIA ACCOUNTS

WHAT YEAR WAS THE BROKERAGE FOUNDED?

OF EMPLOYEES

NOMINATOR NAME

NOMINATOR TITLE

NOMINATOR EMAIL

NOMINATOR PHONE NUMBER

BROKERAGE OF THE YEAR

PART ONE – ANSWER ALL

INTERNAL TECHNOLOGY / OFFICE EFFICIENCY

How is the brokerage removing hurdles and improving their internal workflow? What technology enhancements has the brokerage made to improve office efficiencies?

EMPLOYEES

How is a positive and vibrant office culture being encouraged (i.e. implementation of a performance management system, investment in employee training and development, encouraging leadership amongst young staff)? How are staff inspired to work toward a common goal?

INFLUENCE + INTEGRITY

Knowing that commitment and responsibility aren't confined to business, how does the brokerage give back to the community and/or industry?

CONSUMER TECHNOLOGY + DIGITAL TOOL ADOPTION

How has your brokerage adopted digital tools that appeal to changing consumer preferences?

PART TWO – ANSWER 2

FINANCIAL PERFORMANCE

Does the brokerage have a strong record of financial performance? Has there been positive progress in business development indicators (i.e. new customers, overall PIF count, customer retention)?

STORY

Great history? Niche market? A unique business proposition? A special group of people? Tell us the brokerage's story and how it relates to their success.

STANCE

In the brokerage's opinion, what is today's number one challenge facing Ontario brokerages?

YOUNG BROKER OF THE YEAR



ELIGIBILITY

Broker must be employed at a brokerage that is a full voting member of the IBAO and belongs to their local Affiliate; must not be a member of the IBAO Board of Directors or Executive; must be under 40 years of age OR have less than 5 years experience with a RIBO licence.

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

IS THE BROKER IN GOOD STANDING WITH RIBO?

DOES THE BROKER SIT ON ANY INDUSTRY OR IBAO COMMITTEES (National, Provincial or Affiliate)?

WHAT DESIGNATIONS DOES THE BROKER HAVE?

NOMINATOR NAME

NOMINATOR TITLE

NOMINATOR EMAIL

YOUNG BROKER OF THE YEAR



PART ONE – ANSWER ALL

VISION

How is this Young Broker helping to implement new approaches, either within the brokerage office or within the industry?

INTEGRITY, INFLUENCE + LEADERSHIP

Strength of character is a key component of a great broker. Describe how this Young Broker sets high customer service standards, inspires their peers to do the same, lends a helping hand and encapsulates the spirit of the insurance broker.

PROFESSIONAL DEVELOPMENT

How does this Young Broker help drive business success within the brokerage by investing in themselves to ensure continuous development? Explain their career growth from when they initially joined the industry.

COMMUNITY INVOLVEMENT

Knowing that commitment and responsibility aren't confined to business, how does this Young Broker give back to the community and/or industry?

PART TWO – ANSWER 2

FINANCIAL PERFORMANCE

Does this Young Broker have a strong record of financial performance? Are they seeing positive progress in business development indicators (i.e. new customers, overall PIF count, customer retention)?

PERSONAL BRAND

Has this Young Broker made efforts to establish a personal brand (i.e. do they identify/articulate their unique value proposition and/or leverage a consistent image/message across platforms; are they recognized as an expert in the field; have they established a great reputation and/or advanced their career)? Describe their personal brand and what they've done to get there.

STANCE

What is the Young Broker's opinion of today's number one challenge facing Ontario brokerages? What is their line of sight on the issue, and how will brokers play a role?

RAISING THE BAR

Describe a time when this Young Broker went above and beyond to help a client in need.

AFFILIATE OF THE YEAR



AFFILIATE NAME

AFFILIATE PRESIDENT NAME

MEMBERS OF THE AFFILIATE BOARD OF DIRECTORS

AFFILIATE BUSINESS ADDRESS

AFFILIATE WEBSITE

AFFILIATE SOCIAL MEDIA ACCOUNTS

DOES THE AFFILIATE OFFER EDUCATION PROGRAMS? IF YES, PLEASE LIST.

NOMINATOR NAME

NOMINATOR TITLE

NOMINATOR EMAIL

NOMINATOR PHONE NUMBER

AFFILIATE OF THE YEAR

PART ONE – ANSWER ALL

QUALITY OF MEETINGS + EVENTS

Describe the quality of Affiliate meetings and events. Include the following details:

- Approximate attendance levels
- Types of speakers that have been hosted
- Frequency of meetings
- Topics covered at meetings
- Adding elements of social/fun to the annual meeting calendar, fostering the broker network and establishing a sense of community

MEMBER COMMUNICATION

Strong communications drive strong relationships. How does the Affiliate communicate with its members? What types of content are shared? What channels are used to get the message out?

YOUNG BROKER PARTICIPATION

How has the Affiliate integrated Young Brokers? What evidence of increased industry engagement by Young Brokers, as a result of these efforts, can be shared?

PROMOTION OF THE BROKER CHANNEL

Either by participation in community events or marketing the Bipper, describe how the Affiliate has helped promote the idea that The Best Insurance is an Insurance Broker. Samples of media attention or photos of initiatives are welcomed.

PART TWO – ANSWER 2

SINGLE VOICE

Explain how the Affiliate helps speak as a single voice to political leaders and decision makers. What efforts have members of the Affiliate made with respect to political advocacy and involvement?

MEMBERSHIP

Describe the methods the Affiliate uses to ensure membership levels are maintained, and new members are brought on board.

STANCE

In the Affiliate's opinion, what is today's number one challenge facing the Ontario Broker industry? How will the Affiliate help brokers succeed through the challenges?

INNOVATION AWARD

The Innovation Award is designed to reward the broker, brokerage or group of brokers who elevate the industry. While they may not be the most established, they propel themselves and those around them ever higher, constantly challenging the status quo. This award is not limited to technology-driven brokers/brokerages/group of brokers; it's open to any broker/brokerage/group of brokers that capitalize on opportunity, have a strong vision and are willing to take risks. The honour will be awarded for making a positive impact on our industry.

ELIGIBILITY

The brokerage, broker or group of brokers must be full voting members of the IBAO and members of their local Affiliate.

ENTREPRENEUR(S) BEHIND THE BUSINESS

BROKERAGE NAME / BUSINESS NAME

BUSINESS ADDRESS

BUSINESS PHONE NUMBER

BROKERAGE WEBSITE

BROKERAGE SOCIAL MEDIA ACCOUNTS

NOMINATOR NAME

NOMINATOR TITLE

NOMINATOR EMAIL

NOMINATOR PHONE NUMBER

INNOVATION AWARD

PART ONE - ANSWER ALL

THE IDEA

What new innovative idea or business model has been developed and/or implemented to make a positive impact on the industry and/or brokerage?

THE IMPACT

How has the innovative idea or business model impacted the industry or business in a positive way (i.e. reduced costs, increased market exposure, attracted market segment, created efficiencies, etc.)? Show validation of consumer adoption and/or product effectiveness (examples could include web stats, sales rates, SEO rankings, etc.)

THE ENTREPRENEUR

Describe how the nominee(s) is an independent thinker who is willing to take risks in the face of uncertainty.

FUTURE VISION

What is the nominee's vision or plan for the future growth of the business? Does it demonstrate a clear and sustained capacity for success in the insurance market place?

PART TWO - ANSWER 2

SOURCE

What was the source of the idea?

TEAM MEMBERS

Describe the key members of the team including management and/or vendors who help make it tick.

CULTURE

Explain how these initiatives have helped change the brokerage's previous office culture.

OVERCOMING OBSTACLES

Discuss any significant obstacles the entrepreneur has had to overcome/is overcoming in order to move forward.

STANCE

In the entrepreneur's opinion, what is today's number one challenge facing the Ontario Broker industry? How will innovative efforts help other brokers succeed through the challenges?