

“This program has changed how we think about our business. It really is helpful to take a look at what we do from an operational perspective and really leave that behind and dig deeper into where we need to go.”

Steve Wagler
Partner
Josslin Insurance Brokers Ltd.

“It has afforded us an opportunity to re-align, re-focus, and ensure that we are on the right path. Everything around us is changing at a rapid rate and we need to focus on where we want to be in the evolutionary process. This program does exactly that.”

James Chmiel
President
Erb & Erb Insurance Brokers Ltd.

“It has made us think differently. It has made us approach strategies differently. It has made us plan differently...And I could go on forever.”

Catherine Wilson
Sales & Operations Manager
Steele & Ferraro Insurance Brokers Ltd.



More Information & Testimonials
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Detailed information on all programs and registration can be found on the IBAO website at www.ibao.org

The IBAO School of Insurance

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IBAO Certificate Program

Beyond Best in Class

EDUCATION FOR BROKERS BY BROKERS

*The world of Insurance is changing fast.
Are YOU and your Brokerage ready to respond?*

IBAO School of Insurance



Program Description

BBiC provides you with the knowledge and insights needed to foster **meaningful change** in your business. BBiC provides you with the tools to materially transform the way that you think about – and manage – your brokerage.

This dynamic five day development program is centered on the principles of becoming disciplined, dynamic, dominant and different. It utilizes the power of collaboration and innovation to recognize and tackle the challenges that exist within the traditional brokerage business model. BBiC embraces the same powerful business tools and principles that all great Best in Class organizations have in common.

The series begins with collaborative information sharing session on the changing landscape of consumer expectations, as well as in depth review of consumer intelligence reports. There are dynamic discovery exercises that bring real brokerage issues and challenges to the forefront in order to address and overcome them.

Participants are challenged to:

- Self evaluate your role as a business owner or manager – Are you working in the business or on the business?
- Evaluate your business operations against rapidly changing market conditions and consumer expectations.
- Determine if the “right” people are in the right jobs and are motivated to make the evolutionary journey with you.
- Understand and overcome technological challenges within your brokerage operations

Program Outcomes

- Transform the way you think about and manage your brokerage
- Retain clients in face of competition and attract new clients from both within and outside channel
- Attract, keep, and align the best people
- Achieve sustainable financial and operational performance
- Evolve the brokerage value proposition through innovation, embracing change and continuous improvement
- Grow brokerage top and bottom lines

Program Outline

Day One	A Transforming World and the Need for Meaningful Change Discovering something about ourselves Mapping our Business Today- Market Maps Witnessing Change The Way Out - Beyond Best in Class Re-defining your Business
Day Two	Brand Discussion - It's all about Benefits! Strategy Discussion - Business Effectiveness and Differentiation “Virtual Brokerage” Exercise to Re-Define Your Business Using the Virtual Brokerage and participant brokerages as case studies, new ideas start to take root
Day Three	Human Capital- The “Right” People Discussion Starting the Journey Building a Transformational Agenda for your Brokerage Changing the sign above your door Making change in a low risk environment
Intra Program Collaboration	Monthly on-line collaboration sessions to share participant progress, successes, challenges, etc.
Day Four	Reviewing the BBiC changes in broker offices Lessons Learned- How to push the boundaries Human Capital Tactics- A Practical Approach The right employees to sustain a BBiC brokerage
Day Five	Technology & Productivity Discussion Key Metrics Discussion BBiC Non Linear Business Model Planning Process Pulling It All Together and Wrap Up
Post Program Collaboration	Monthly on-line collaboration sessions to share participant progress, successes, challenges, etc.

Seminar Format

The program is delivered in two segments with a four month gap in between to allow for hands on application of BBiC tools and principles. Collaborative learning occurs monthly during the four month gap between sessions and the four months following the program.

*Certificate of Recognition will be issued upon completion of full program

PARTICIPATION REQUIREMENTS

The BBiC program is designed to work most effectively with two senior brokerage personnel. Participants will ideally be one Broker Principal/Owner and one Senior Operations or Department Manager.

Participation will be on a first come, first serve basis and will be limited within geographic trading areas.

DATES

Session 1: Mar. 27-29, Jun. 27-28 Toronto
Session 2: May 15-17, Sept. 6-7 Barrie
Session 3: Sept. 25-27, Jan. 23-24 Cambridge
Session 4: Dec. 4-6, Mar. 6-7 Niagara

FEE: \$5500

1st Participant from Office: \$3500
 2nd Participant from Office: \$2000

PACKAGE INCLUDES

- 5 One-Day Seminars & Program Materials
- Customer Measurement and Risk Assessment Report
- Organizational Culture Survey
- Collaborative Learning Sessions

FACILITATORS

Program: Bill Morris, BA, Navicom Inc.
Human Resources: Alex Gallacher, MBA, ICD.D, Engage HR

RIBO ACCREDITATION

20 Management Hours