

2009 AWARD OF EXCELLENCE

CATEGORY: BROKERAGE FIRM

(Please check (✓) only **one** box):

Less than 10 member brokers

More than 10 member brokers

Selection Criteria:

Listed below are the criteria for this award. Finalists will be judged based on criteria requirements. The candidate must:

- Contribution to promoting the profession, use of the BIPPER, and promotion of My Insurance Shopper;
- Interesting initiatives taken with respect to marketing, promotion and business development;
- Growth of brokerage;
- Internal management model;
- Customer service.

Registration Form:

Contact Person / Principal: _____

Brokerage Name: _____

Address: _____

City: _____ Postal Code _____

Tel: _____ Fax: _____ Email: _____

Branches, if any _____

Number of Employees _____

Please return your questionnaire no later than **August 7th, 2009** to:
IBAO, attn: Maria Roscetti, 1 Eglinton Ave. East, Suite 700, Toronto, ON M4P 3A1
Tel: (416) 488-7422 INWATS: 1-800-268-8845 Fax: (416) 488-7526 Email: mroscetti@ibao.on.ca

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Questionnaire:

It is important to answer **all of the questions in full while remaining concise!** Questions are to be answered in order they appear in the questionnaire. Your answers may be handwritten or typed. Please note the general presentation of your file (spelling, tone, arguments and choice of examples) as well as all other documents you consider useful to be attached to your file as they count for 10% of total points.

Formal presentation of responses will be awarded more points.

1. What are the marketing or customer service initiatives that illustrate the vitality of your brokerage?

- Choose a marketing, promotion or business development initiative in which your brokerage has stood out and obtained satisfying results.
- Indicate who did what and the main steps taken.

Describe:

- The type of project
- The target clientele
- The means used
- The budget allocated
- The results obtained

2. What would your business vision be for the short and/or long term i.e.:

- Client Retention
- Customer Growth – Organic or acquisition
- Succession planning

3. What does your firm do for Professional Development of your brokerage?

For example, Education:

- CAIB Program
- CPIB Program
- CCIB Program
- Best Practices

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4. Is there another element that you would like to emphasize to support the nomination of your firm?

In addition to the elements already covered in the preceding questions, if you wish you may add other information to clarify the value of your nomination and complete your file.

For example: Community Involvement:

- Charities
- Volunteerism
- Sponsorship of local sports teams, etc.

5. How do you make use of the “BIPPER” in your brokerage?

- In displays (signs, posters)
- In your presentations (business cards, promotional articles)
- In your correspondence (letterhead, invoices, memos)
- In your advertising (television, newspapers)

6. Do you participate in the promotion of My Insurance Shopper? If so, how?

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Documents to be attached to your presentation file:

- Registration form and answers to the questions in this document.
- Any other document you consider would be useful in helping the Selection Committee make its decision.
- Forward brokerage logo via email to Maria Roscetti at: mroscetti@ibao.on.ca

Procedure:

- All the duly completed documents must be received at the address indicated no later than August 7th, 2009.
- At the end of August, the jury will analyze the nominations received and choose three candidates per category. The winner of the “Award of Excellence” will be chosen from among these finalists.
- The three finalists will be interviewed with the members of the Selection Committee for a final interview via teleconference in September.
- The three finalists will each receive 1 complimentary ticket to the Banquet and Ball on Friday, October 23, 2009 at The Fairmont Royal York Hotel.
- The winner of the “Award of Excellence” Category - Brokerage, will be announced during the Banquet and Ball on Friday, October 23, 2009 at The Fairmont Royal York Hotel.
- A mention of the winner, along with a photograph will be published in their local community newspaper / publication of their choice, The Ontario Broker magazine and Canadian Underwriter Magazine (November issue).

Thank you for your participation!

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