
Insurance Brokers Association of Ontario
87th Annual Convention

PROGRAM



Wednesday, October 17 - Friday, October 19, 2007
The Fairmont Royal York Hotel
Toronto, Ontario

A large purple arrow pointing to the right, containing the text "Register Early & SAVE!".

Register Early
&
SAVE!

HIGHLIGHTS

Spouse Program
Information Enclosed

SCHEDULE OF EVENTS

Wednesday, October 17, 2007

7:30 a.m. - 8:00 p.m. **Registration Desk Open**
Pick up your name badge. Entrance to all functions is by badge identification!

7:45 a.m. - 11:00 a.m. **Breakfast & Affiliate Presidents' Meeting**

11:30 a.m. - 1:30 p.m. **Education Awards Luncheon**
Join us as we honour those who have achieved their professional designation.

1:30 p.m. - 4:30 p.m. **Members' General Meeting**

5:15 p.m. - 8:30 p.m. **Exhibitors' Opening Reception**
Kick off the convention at the Exhibitors' Opening Reception. Exhibitors will be presenting a major showcase of products and services to member brokers during the convention.

8:30 p.m. - 12:00 a.m. **Opening Night Party**
featuring **The Sandy Vine Band**
A great way to kick off the 2007 convention!

Thursday, October 18, 2007

7:30 a.m. - 8:00 p.m. **Registration Desk Open**
Remember, your badge is needed for admittance to all functions.

7:30 a.m. - 8:30 a.m. **Continental Breakfast in the Exhibit Area**
Start your morning off on the right track. The Exhibit Area is the activity centre of the convention providing maximum networking opportunities each day.

8:30 a.m. - 9:15 a.m. **Keynote Speaker**
Dr. David Foot,
World-Renowned Demographics Expert



David K. Foot, Professor of Economics at the University of Toronto, is the author of the best-selling books *Boom, Bust & Echo: How to Profit from the Coming Demographic Shift* and *Boom, Bust & Echo: Profiting from the Demographic Shift in the 21st Century*. These books are based on his research on the economic impact of demographic change and the resulting implications for industry sectors and both private and public policy. Foot is an outspoken and controversial demographics expert who can bring to life demographic statistics and make the aging of society relevant to any specific interest group. He explores how changing demographics, especially the aging of the massive Boomer generation and the coming into the marketplace of their children, the Echo generation, will redefine society's needs. Change can't be avoided, but it can be prepared for and managed. With an understanding of demographics, a business, an individual or a government has a strong foundation upon which to build.

9:15 a.m. - 11:30 a.m. **Members' Closed Meeting**
Hear important industry news and provide your views about the direction IBAO needs to take in the coming year.

Thursday, October 18, 2007 *continued*

11:30 a.m. - 1:30 p.m. **Exhibit Area Buffet Lunch**
Enjoy your lunch while networking with peers and meeting new contacts. Here's an opportunity to discuss new products, see advances in new technologies and personally meet with industry leaders.

1:30 p.m. - 4:45 p.m. **CSR SEMINAR:**

Growing Your Sales and Service Advantage

(RIBO CE - 3 Personal Skills Hours)
Barry Nelson, author of "*Growing Vital Skills*"
Practical Management of Canada Inc.

This interactive workshop will expand upon the existing basics of customer service focusing on the broker sales and service advantage. It's designed for brokerage front line staff who wish to build client experiences that will **propel your brokerage forward**.

Objectives:

- Identify core competencies of exceptional client service
- Measure customer service skills and response instantly
- Get over the mental hurdle of service vs. sales, using the "Interest-Based Approach"
- Beat the competition by servicing the client via cross-selling and account rounding
- Apply high-touch anticipation of customer interests that are at stake and create simple, real world rounding solutions that make sense
- Avoid forbidden phrases and conflict spirals

1:30 p.m. - 5:00 p.m. **MEMBERS' SEMINAR:**

CEO Panel

(RIBO CE - TBA - Management Hours)

Limited Seating!

Back by popular demand! Once again, we will be giving insurer CEO's an opportunity to share their visions and answer a balanced array of questions from you, the member broker, and driving force of their distribution channel. Each year brings new challenges and opportunities to the insurance industry, and the few hours of open dialogue is an excellent way to get a better understanding of the issues as seen from the eyes of the insurer. This year's moderator will be Randy Carroll, Chief Executive Officer of the Insurance Brokers Association of Ontario. Our panel will be announced in the near future, so stay tuned for a convention update.

5:30 p.m. **Exhibit Prize Draws**
Join in the chaos! Be there to claim your prize.

6:30 p.m. - 10:00 pm. **Hospitality Night**
The tradition continues - good food, good wine, and GREAT HOSPITALITY!



Are You Under 40? Don't be left out!

The 87th Annual Convention will enable young brokers to network with a wide variety of professionals and gain new insights into the future of our increasingly complex industry. Join the YBC! To be eligible, you must be under 40 and working for a member office.

That's all!

SCHEDULE OF EVENTS

Friday, October 19, 2007

7:30 a.m. - 12:30 p.m. Registration Desk Open

Remember to pick up your name badge.

7:30 a.m. - 8:30 a.m. Continental Breakfast

8:30 a.m. - 11:45 a.m. EDUCATION SEMINARS (AM):
(only 1 may be selected)

A Turbulence - Re-tooling in the 21st Century

(RIBO CE - 3 Management Hours)

Michael Vickers, Sales & Marketing Motivator

Acquire new strategies and tactics to compete effectively in today's turbulent marketplace and well into the 21st century. Technology is dramatically changing the landscape of modern business and tomorrow's success stories must learn to apply new tools if they are to be competitive in a global marketplace. The concepts taught are applicable to most business situations and will give you competitive advantage for years to come.

Objectives:

- Understand the six engines of change and how they affect your company
- How to create and deliver value in the new economy
- Become unique and distinct in a crowded marketplace
- Break your personal and organizational income ceiling
- Build long-term economic relationships of trust
- Employ "High Touch" delivery systems

B Creating a Brokerage Sales Culture

(RIBO CE - 3 Management Hours)

Wayne A. Walkotten, CPA, CVA

Senior Vice President - Marsh, Berry & Company Inc.

It is well accepted that businesses must grow or they will die. Insurance brokerages are no exception. This session will help brokerage owners and managers understand the impact of growth on value. To drive value, a brokerage must strive to create a *Total Brokerage Sales Culture*.

Objectives:

- State of the industry
- Understand brokerage value
- Create a total brokerage sales culture
- Should we acquire or hire?
- Steps to effective sales management

C E & O Mock Trial

(RIBO CE - 3 Management Hours)

Panel

Businessman Glen Hogan buys a warehouse and arranges coverage for it with his broker, Carla Carefree. Carla asks her assistant Betty to contact the insurer, Noway Insurance Company. But after the building suffers a major fire loss, Glen discovers he doesn't have the coverage he thought he had.

Was Glen in too much of a hurry? Was Carla too carefree? Was Betty to blame? Is Noway on firm legal ground to say "No way!" to the claim? A courtroom drama ensues as the opposing parties and their legal counsel try to put the blame anywhere else but on themselves.

All rise. Court is now in session...

HOGAN GOLF LTD.

v.

NOWAY INSURANCE COMPANY & CAREFREE INSURANCE BROKERAGE

Friday, October 19, 2007 *continued*

12:00 p.m. - 1:30 p.m. Industry Day Luncheon

Join your industry colleagues for lunch. Through the State of the Union Inaugural Address by our Incoming President and highlights of IBAO's activities, attendees can take pride in the association and find out plans for the upcoming year.

1:45 p.m. - 5:00 p.m. EDUCATION SEMINARS (PM):
(only 1 may be selected)

A Creating Distinctive Value: Up-Leveling the Brand Experience

(RIBO CE - 3 Management Hours)

Michael Vickers, Sales & Marketing Motivator

This informative and applicable program will show you how to identify customer touch points that enhance the customer's experience at every level. It will show you how to become a customer-centric organization. Today's customer is more sophisticated than ever, and the ability of the sales and service organization to create a positive experience for the customer at every level will have a dramatic impact on profitability and market growth.

Objectives:

- Create an emotional connection with your customers
- Enhance the customer experience at every touch point
- Develop and manage a customer centric focused organization
- Use technology to manage customer relationships
- Apply 13 key strategies for service excellence

B Creating a Brokerage Sales Culture

(RIBO CE - 3 Management Hours)

Wayne A. Walkotten, CPA, CVA

Senior Vice President - Marsh, Berry & Company Inc.

Repeat from morning session. Refer to Friday AM.

C HR in Action: People Make the Difference

(RIBO CE - 3 Management Hours)

Alex Gallacher, MBA, CHRP

ENGAGE Human Resources Solutions Inc.

Do you want to learn simple tactics to help your human resources make a difference within your brokerage? This seminar will outline the major areas of Human Resource Management and provide you with simple techniques to attract, retain, motivate and manage employees. Through this interactive seminar, you will learn to develop and implement human resources practices that will enable employees to perform to their maximum capability.

Objectives:

- Understand the importance of human capital and its implications on the overall success of the brokerage
- Possess strategies and tactics to recruit the right person to suit the position and brokerage
- Discuss the roles of each employee within your brokerage and have tactics to further clarify their roles to create job descriptions
- Have the tools and confidence to manage performance through coaching, employee reviews and improvement programs



SCHEDULE OF EVENTS

Friday, October 19, 2007 *continued*

6:30 p.m. - 12:30 a.m.

President's Reception & *Banquet & Ball*

featuring: **Ron James, Award-Winning Comedian & Satirist**
and dance band performance by **Sandy Vine & The Midnights**



moving the whole night long!

Sandy Vine and The Midnights have been delighting crowds with their party dance music for over ten years. Their nostalgia-influenced sound brings back the best memories of the 1950's to the 1990's, as well as the Top 40 hits of today. If you love to dance, then squeeze onto the dance floor - Sandy Vine and The Midnights will keep you and your guests

Ron James Award-Winning Comedian & Satirist



Hailed by critics from coast to coast, RON JAMES is Canada's #1 selling comedian, who's ninety minute, laugh a second, physically driven performances have consistently sold out theatres coast to coast. Keeping a comedian's eye trained for satire and a poet's ear tuned for language, James cuts a wide swath clear cross Canadian culture, making him a stand-out among stand-up performers.

James has written and starred in four network comedy specials including "The Road Between My Ears" ("...utterly brilliant", Ottawa Sun); "Quest for the West" ("...a virtuoso comedic performance", Globe and Mail) and "West Coast Wild" ("...hilarious...devastatingly funny and clever", Globe and Mail). For two seasons he starred in a nationally televised sitcom of his own creation, "Blackfly". He's been nominated for Best Supporting Actor at the Genie Awards, won a Gemini Award as part of the writing team for "This Hour Has 22 Minutes" and been voted Canadian Comedian of the Year.

SPEAKER PROFILES

Michael Vickers Sales & Marketing Motivator



Michael Vickers is a popular speaker, entrepreneur, educator and author. His dynamic, humorous and insightful sessions coach thousands of professionals to grow individual and organizational performance. His success is completely built on his personal experience. A consummate entrepreneur, he is a graduate of his own franchised retailing enterprise, a manufacturing and distribution company, and a highly successful publishing venture.

A ceaseless innovator, Vickers is constantly researching leading companies in search of best practices and distilling their experience of success. Many of his compelling insights are highlighted in his book, "Becoming Preferred: How to Outsell Your Competition".

His unique gifts are his mastery of the art of influence and his ability to translate that mastery into practical, powerful techniques anyone can use. Michael Vickers' sessions are educational, entertaining, intimate and unabashed – he is hilarious in his stories, boundless in his enthusiasm, and relentless in his message that success is available to everyone!

Wayne A. Walkotten, CPA CVA Marsh, Berry & Company Inc.



Wayne Walkotten joined MarshBerry in 2001 as Vice President/ Senior Consultant in charge of the company's Michigan office. In addition to managing the company's Michigan office, he is also a vital resource in the areas of mergers and acquisitions, strategic solutions, business planning and financial management.

Prior to joining MarshBerry, Wayne was Chief Operating Officer of Grand Rapids Holland Insurance and was instrumental in the company's purchase by Old Kent Financial Corporation. He served as its Chief Financial Officer and was a MarshBerry client until he joined the company in 2001.

Alex Gallacher MBA, CHRP ENGAGE Human Resources Solutions Inc.



Alex is a co-founder and Managing Director of ENGAGE Human Resources Solutions Inc. and EHRSearch. He has earned a reputation as being a Human Resources Leader who aligns people with business strategies. Alex's sector experience includes: Professional Services, Retail, Not-for-Profit, Public Sector, Financial Services, Franchise Operations and Manufacturing. He operates with a global perspective, having worked with business partners and team members in the United States, Europe and Asia Pacific.

Alex is a highly successful builder of motivated, productive work groups that meet and exceed business and organizational objectives. He has a strong background in the people components of financial and corporate governance, helping put the pieces in place to ensure accountability, responsibility and results.

Alex teaches Human Resources Management for some of Canada's top business schools in Canada and overseas.

Barry Nelson Practical Management of Canada Inc.



Barry is part owner of PMCI, an international training company based in Toronto that has been "Growing Vital Skills Since 1978". He is a consultant, designer, trainer, and business author who regularly engages with organizations from their front line workers right up to senior level executives in areas including innovation, crisis management, customer service, negotiation skills, executive performance improvement, process change, multi-channel communications and corporate needs assessment.

Barry is an enthusiastic and passionate trainer/facilitator who helps his clients learn according to their needs from corporate training and consulting, HR resource development, sales, and motivational public speaking for small groups to thousands.

GENERAL INFORMATION

Sign Up

Complete the enclosed Convention Registration Form. If you are bringing a spouse or a guest, please complete a separate form.

Sign Up Early and Save!

You'll get substantial savings just by registering early! Make sure your registration is mailed or faxed back to us by September 14, 2007. **Sorry, we are not able to accept registrations over the phone.**

Register by Mail...

Send your registration form with **payment** to: **IBAO**
Please make cheques payable to IBAO

or by Fax

Fax your completed registration form with your credit card number clearly indicated with the expiration date to IBAO's office at: 416-488-7526.

We accept...



Refunds

Full refunds will be granted if a written request is received prior to September 14, 2007. If a written request is received prior to September 28, 2007, a full refund minus a \$50 administrative charge per registration will be granted.

NO REFUNDS WILL BE GRANTED AFTER: September 28, 2007

Transferable Registrations

Only registrations in the company's name are transferable.

Special Assistance

Please advise us of any "special needs" (i.e., physical, **dietary**). We will be glad to assist you.

Name Badges

Only registered convention attendees will receive name badges. Please wear them to guarantee admittance to all functions.

Door and Draw Prizes

All prize winners must be registered member brokers and must be present at the time of the draw.

What to Wear

Meetings & Seminars: Business Casual
Banquet & Ball: Formal, Black Tie Optional

Hotel Accommodations

Your hotel reservation is not included in your Convention Registration Package. We have been guaranteed room rates for single or double occupancy reserved before September 4, 2007.

for reservations made by **September 4, 2007:**



The Fairmont Royal York Hotel

100 Front Street West,
Toronto, Ontario M5J 1E3

**\$189 per night,
single or double plus taxes
for reservations made by
September 4, 2007**

Tel. 416-368-2511 or 1 888-270-8802

Transportation

By Train...

Call **VIA Rail** for considerable savings and quote the following convention number when making your travel arrangements:



Promo # 11101 Tel: 1-888-842-7245

By Automobile...

The Fairmont Royal York Hotel is readily accessible with major connecting highways that lead directly into downtown Toronto.

Weather

Typically, October weather in Toronto is: High: 13°C Low: 7°C

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88th Annual Convention

IBAO

**Mark Your
Calendar!**

Wednesday, October 22 - Friday, October 24, 2008
The Fairmont Royal York Hotel
Toronto, Ontario

Start planning now to join with the most extensive network of insurance professionals in
the country.

It's the BIG event to develop solid business partners and find real solutions –
and all at a magnificent, world-class venue.

2008

Insurance Brokers Association of Ontario

1 Eglinton Avenue East, Suite 700, Toronto, Ontario M4P 3A1 Tel: 416-488-7422 1-800-268-8845 Website: www.ibao.org