



**IBAO**  
AWARDS OF  
EXCELLENCE  
**2018**

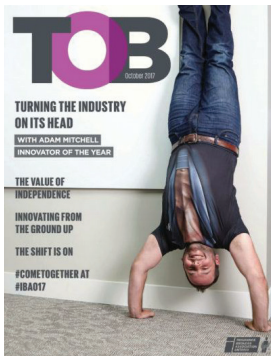
**FEED THE  
FIRE  
WITHIN**

OCTOBER 17-18  
**IBAO**  
CONVENTION

APPLICATION DEADLINE - AUGUST 18

# best in class

Top insurance professionals are pace setters. They're best in class performers who deserve recognition. 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 in a nomination.



## and the winner is...

### PANEL OF JUDGES

Nominees are evaluated by an independent panel that knows best in class practices when they see them. This year's panel of judges includes business leaders and industry partners.

### BENEFITS

Winning an IBAO Award of Excellence is advantageous for both your personal and professional brand. It enhances your business profile and can create many opportunities for business development, attracting new talent, marketing and promotions.

Every winner is featured on the cover of The Ontario Broker magazine, receives a professional photo shoot and has their success story shared in a feature article. Finalists are recognized in a press release leading up to the IBAO Awards of Excellence Gala; winners are formally announced in a release following the Gala to industry media, members and industry stakeholders.

### AWARDS OF EXCELLENCE GALA

The broker community comes together to honour Awards of Excellence finalists and winners every year at the IBAO Convention – this year October 17th in Niagara Falls. Family, friends, colleagues and supporters are invited to join the celebration of winners and the success of the broker industry.

### GUIDELINES

- Use your entry to tell your story – narrative is a critical evaluation tool for our panel of judges
- Answers should be 250 words each or a video entry of any length
- Email completed forms, answers and supporting photos, videos and/or documentation by August 18th to: NORAH BLACK, nblack@ibao.on.ca, 416.488.7422 x128

## timeline

●	JULY 11 - AUGUST 18	NOMINATIONS ACCEPTED
●	AUGUST 18 - 31	SUBMISSION REVIEW
●	SEPTEMBER 1 - 15	FINALIST INTERVIEWS
●	SEPTEMBER 15 - 30	FINALIST ANNOUNCEMENT
●	OCTOBER 17	AWARDS OF EXCELLENCE GALA 98 <sup>TH</sup> ANNUAL IBAO CONVENTION
●	POST CONVENTION	WINNER ANNOUNCEMENT

# brokerage of the year

ELIGIBILITY: Brokerage must belong to their local Affiliate. Principal Broker or member of Senior Management cannot be a member of the IBAO Board of Directors or Executive.

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BROKERAGE NAME

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BROKERAGE ADDRESS

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BROKERAGE PHONE NUMBER

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BROKERAGE WEBSITE

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BROKERAGE SOCIAL MEDIA

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YEAR THE BROKERAGE WAS FOUNDED

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# OF EMPLOYEES

---

NOMINATOR NAME

---

NOMINATOR TITLE

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NOMINATOR EMAIL

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NOMINATOR PHONE NUMBER

1. How is the brokerage removing hurdles and improving their internal workflow? What technology enhancements has the brokerage made to improve office efficiencies?
2. 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?
3. How does your brokerage give back to the community and/or industry?
4. How has your brokerage adopted digital tools that appeal to changing consumer preferences?
5. 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)?
6. Tell us your brokerage's story and how it relates to your success (i.e. great history, niche market, a unique business proposition, a special group of people, etc.)
7. What is the number one challenge facing Ontario brokerages today, why and how are you overcoming it?

# 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 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.

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NOMINEE NAME

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NOMINEE TITLE

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NOMINEE EMAIL

---

NOMINEE PHONE NUMBER

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NOMINEE BUSINESS ADDRESS

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BROKERAGE NAME

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BROKERAGE WEBSITE

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

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# OF YEARS AT CURRENT BROKERAGE

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# OF YEARS IN THE INDUSTRY

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IS THE BROKER IN GOOD STANDING WITH RIBO?

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DESIGNATIONS

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INDUSTRY OR IBAO COMMITTEES (NATIONAL, PROVINCIAL, AFFILIATE)

---

NOMINATOR NAME

---

NOMINATOR TITLE

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NOMINATOR EMAIL

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NOMINATOR PHONE NUMBER

1. How is this Young Broker helping to implement new approaches, either within the brokerage office or within the industry?
2. 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 an insurance broker.
3. 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.
4. How does this Young Broker give back to the community and/or industry?
5. 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)?
6. 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.
7. 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?
8. Describe a time when this Young Broker went above and beyond to help a client in need.

# innovator of the year

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.

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NOMINEE(S) NAME(S)

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BROKERAGE / BUSINESS NAME

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BUSINESS ADDRESS

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BUSINESS PHONE NUMBER

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WEBSITE

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SOCIAL MEDIA ACCOUNTS

---

NOMINATOR NAME

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NOMINATOR TITLE

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NOMINATOR EMAIL

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NOMINATOR PHONE NUMBER

1. What new innovative idea or business model has been developed and/or implemented to make a positive impact on the industry and/or brokerage?
2. 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.)
3. Describe how the nominee(s) is an independent thinker who is willing to take risks in the face of uncertainty.
4. 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?
5. What was the source of the idea?
6. Describe the key members of the team including management and/or vendors who help make it tick.
7. Explain how these initiatives have helped change the brokerage's previous office culture.
8. Discuss any significant obstacles the entrepreneur has had to overcome/is overcoming in order to move forward.
9. 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?

# affiliate of the year

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AFFILIATE NAME

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AFFILIATE PRESIDENT NAME

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MEMBERS OF AFFILIATE BOARD OF DIRECTORS

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AFFILIATE BUSINESS ADDRESS

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AFFILIATE WEBSITE

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AFFILIATE SOCIAL MEDIA ACCOUNTS

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AFFILIATE EDUCATION PROGRAMS

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NOMINATOR NAME

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NOMINATOR TITLE

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NOMINATOR EMAIL

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NOMINATOR PHONE NUMBER

1. 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
2. How does the Affiliate communicate with its members? What types of content are shared? What channels are used to get the message out?
3. 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?
4. Describe how the Affiliate has helped promote the idea that The Best Insurance is an Insurance Broker.
5. What efforts have members of the Affiliate made with respect to political advocacy and involvement?
6. Describe the methods the Affiliate uses to ensure membership levels are maintained, and new members are brought on board.
7. 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?