



2024
**IBAO AWARDS
OF EXCELLENCE**

OCTOBER 23 | SHERATON CENTRE TORONTO

APPLICATION DEADLINE—AUGUST 1ST

BEST IN CLASS PERFORMANCE

IBAO's Awards of Excellence celebrate achievement across Ontario's broker channel. If you or a broker you know have excelled in your field and deserve some recognition, we encourage you to submit a nomination.

WHY APPLY

Awards of Excellence Finalists & Winners benefit from:

- The opportunity to showcase their professional achievements to their network and boost their business profile
- Marketing and promotional opportunities, business development and talent acquisition

AWARDS OF EXCELLENCE WINNERS RECEIVE:

- A designer award to display
- A feature in the Ontario Broker magazine
- Press, promotion and accolades

GUIDELINES

If you've won in the last two years (2022/2023) you're ineligible to apply for the same award this year. But we encourage you to nominate any deserving peers. Think of all those high achievers who are too modest to nominate themselves—they deserve recognition too!

- Use your entry to tell a narrative—it's not about length, it's about your story of success
- Winning submissions feature photos, examples, links, social posts, industry press, blogs
- Video submissions are encouraged
- The more creative, the better

PROCESS

Submit entries online through this online form

- Apply by August 1st
- Separate nominations are required if you're submitting for more than one category
- Winners will be announced at our Awards of Excellence Gala, October 23rd at IBAOcon

LARGE BROKERAGE AWARD

ELIGIBILITY

- More than 25 licensed brokers
- Principal Broker/Senior Management cannot be a member of the IBAO Executive/Board of Directors
- Brokerage must be an IBAO Member

BROKERAGE NAME

ADDRESS

WEBSITE

SOCIAL MEDIA HANDLES

YEAR OF FOUNDING

NUMBER OF LICENSED BROKERS

1. How has your brokerage adapted to the changing market in recent years (technology, internal efficiencies, staffing, recruitment)?
2. How is your brokerage creating a positive and vibrant office culture (performance management systems, employee training and development, staff empowerment, retention, working towards common goals)?
3. How has your brokerage adopted tools and practices that appeal to changing consumer preferences and demographics (digital presence and processes, customer outreach, communication strategies, advertising, automation, charitable giving)?
4. How has your brokerage demonstrated strong operational performance (actions/strategies that create measurable internal efficiency gains, new customers, retention, growth percentage by policy/premium, profitability, financial stability)?
5. How has your brokerage demonstrated an unwavering focus on the customer (NPS, Google Reviews)?
6. How has your brokerage given back to its local community and/or contributed to charities through volunteering, charitable giving or other involvement?

SMALL BROKERAGE AWARD

ELIGIBILITY

- 25 or fewer licensed brokers
- Principal Broker/Senior Management cannot be a member of the IBAO Executive/Board of Directors
- Brokerage must be an IBAO Member

BROKERAGE NAME

ADDRESS

WEBSITE

SOCIAL MEDIA HANDLES

YEAR OF FOUNDING

NUMBER OF LICENSED BROKERS

1. How has your brokerage adapted to the changing market in recent years (technology, internal efficiencies, staffing, recruitment)?
2. How is your brokerage creating a positive and vibrant office culture (performance management systems, employee training and development, staff empowerment, retention, working towards common goals)?
3. How has your brokerage adopted tools and practices that appeal to changing consumer preferences and demographics (digital presence and processes, customer outreach, communication strategies, advertising, automation, charitable giving)?
4. How has your brokerage demonstrated strong operational performance (actions/strategies that create measurable internal efficiency gains, new customers, retention, growth percentage by policy/premium, profitability, financial stability)?
5. How has your brokerage demonstrated an unwavering focus on the customer (NPS, Google Reviews)?
6. How has your brokerage given back to its local community and/or contributed to charities through volunteering, charitable giving or other involvement?

INITIATIVE AWARD

ELIGIBILITY

- A brokerage, broker or group of brokers that has advanced and/or made a positive impact on Ontario's broker channel through a specific opportunity, innovation, project or initiative. Can include:
 - Media projects (YouTube channel, Tik Tok account, podcast)
 - Recruitment events to bring new talent to the channel
 - Novel charity initiatives
 - Technological innovation
 - Other
- Must be an IBAO Member Brokerage, individuals must be employed by an IBAO Member Brokerage or in the case of a group, the leader/founder of the group must be employed by an IBAO Member Brokerage.

NOMINEE NAME(S)

NOMINEE EMAILS(S)

BROKERAGES(S)

ADDRESS

SOCIAL MEDIA HANDLES

WEBSITE

1. What's the initiative, who is involved and how has it made a positive impact on the broker channel?
2. How did the initiative come about? What was its initial inspiration/motivation?
3. How has the initiative been received? (provide specific feedback)
4. Describe any significant obstacles the initiative had to overcome to be successful.
5. What's the plan for this initiative moving forward?

RISING TALENT AWARD

ELIGIBILITY

- Under 40 years of age or have less than 5 years' experience with a RIBO license
- Cannot be a member of the IBAO Executive/Board of Directors (YBC Council Team Leads are eligible to apply)
- Must be employed by an IBAO Member Brokerage

NOMINEE NAME

NOMINEE TITLE

BROKERAGE NAME

BROKERAGE ADDRESS

SOCIAL MEDIA HANDLES

WEBSITE

NUMBER OF YEARS LICENSED

1. How is this broker helping to inspire and implement new approaches within the brokerage and broader insurance industry?
2. How does this broker set high customer service standards, inspire their peers, invest in continuous education and give back to their community?
3. How has this broker established their personal brand (i.e. how do they articulate their value proposition, how are they recognized as an expert in the field, how do they leverage a consistent image and message across platforms, how have they advanced their career)?
4. How does this broker demonstrate a strong record of adding value to corporate strategy (i.e. specific actions/strategies that create measurable internal efficiency gains, number of clients/policies, customer retention, growth percentage by policy/premium)?
5. How has this broker gone above and beyond to help their clients?

AFFILIATE AWARD

ELIGIBILITY

- Must be a recognized [Ontario Affiliate Association](#)

AFFILIATE NAME

AFFILIATE PRESIDENT NAME

MEMBERS OF AFFILIATE BOARD OF DIRECTORS

BUSINESS ADDRESS

WEBSITE

SOCIAL MEDIA HANDLES

AFFILIATE EDUCATION PROGRAMS

1. What changes has the Affiliate made to remain vibrant, including strategies to ensure the future sustainability of the organization?
2. Describe the quality of Affiliate meetings and events including frequency of meetings/events, attendance levels, speakers/topics and social/fun/innovative aspects that foster the broker network and establish a sense of community.
3. How does the Affiliate communicate with its members, what types of content are shared, what channels are used to get the message out and how effective are they (i.e. open rates, social engagement, growth)? How are membership levels maintained and new members brought on board?
4. How has the Affiliate integrated Young Brokers, and as a result, what evidence of increased industry engagement can be shared?
5. How has the Affiliate helped promote Ontario's broker channel, its local brokerages and broker professionals, and the broker value proposition?
6. What efforts has the Affiliate made with respect to political advocacy and involvement?

INSURTECH AWARD

ELIGIBILITY

- **Innovation:** Nominees for this award are expected to exhibit a pioneering approach to insurance technology. This involves creating new products, services, or technologies that have made significant contributions to transforming the industry.
- **Impact:** Nominees must demonstrate how their technological innovations have beneficially influenced the insurance sector, its customers, and other stakeholders. Key impacts to highlight include enhancements in operational efficiency, cost reductions, improved client service, and broader accessibility.
- **User Adoption:** Nominees should provide evidence of effective adoption of their technology solutions. Indicators of success include positive client feedback, and robust user engagement.

NOMINEE NAME(S)

NOMINEE EMAILS(S)

BROKERAGES(S)

ADDRESS

SOCIAL MEDIA HANDLES

WEBSITE

1. What is the innovative technology, product, or service? Who are the key players involved, and how has it positively impacted the insurance industry?
2. How was the innovation developed? What inspired or motivated its inception?
3. How has the innovation been received within the industry? Please provide specific feedback or testimonials.
4. What significant challenges or obstacles did the initiative face, and how were they overcome?
5. What are the future plans for this innovation? How does the nominee intend to sustain and evolve the initiative?

DEI BROKERAGE AWARD

CRITERIA

- **Comprehensive DEI Strategy:** Nominees should demonstrate a well-rounded and proactive commitment to diversity, equity, and inclusion across all levels of their organization. This includes the development and implementation of DEI policies, continuous education and training programs, and innovative practices that promote inclusivity.
- **Effectiveness and Impact of DEI Initiatives:** Nominees must showcase how their efforts have led to significant improvements in workforce diversity, employee engagement, leadership inclusiveness, and client relations.
- **Future Commitment to DEI:** Nominee should showcase ongoing and future plans for maintaining and expanding their DEI efforts. This includes setting clear, actionable DEI goals, securing resources for sustained initiatives, and mechanisms for regular review and adaptation of DEI strategies to meet evolving needs and challenges.

NOMINEE NAME(S)

NOMINEE EMAIL(S)

BROKERAGE(S)

BROKERAGE ADDRESS

SOCIAL MEDIA HANDLES

WEBSITE

1. How does your brokerage demonstrate its commitment to diversity, equity, and inclusion? Please describe specific initiatives or policies that have been implemented.
2. What positive impacts have your DEI initiatives had on your brokerage? Consider aspects like workplace culture, employee satisfaction, client relations, and business outcomes.
3. How are employees and leadership involved in your DEI efforts? Please share examples of how various levels of your organization participate in these initiatives.
4. What challenges has your brokerage faced in implementing effective DEI practices? How have these challenges been addressed?
5. What are your brokerage's future goals regarding diversity, equity, and inclusion? How do you plan to achieve these goals and continue to build on your current efforts?