

8th

ANNUAL Customer Service

Workshop & Retreat



PANTAGES
SUITES • HOTEL • SPA

November 10 - 13, 2010
Toronto • Ontario

IBAO

About Pantages Suites Hotel:

The Pantages Suites Hotel & Spa is located in the heart of Toronto in the theatre and entertainment district. This extraordinary boutique hotel boasts luxury and refinement with its contemporary styling and modern architecture. The Pantages Hotel offers outstanding amenities including a Martini Bar, Pantages Spa and Wellness Center and 24 hour state of the art fitness facilities. The Pantages is much more than just accommodations and promises to exceed all your expectations and engage all your senses!



Take a tour of the resort and facilities by visiting their website at www.pantageshotel.com



Pantages Spa and Wellness Center:



The philosophy of the Pantages Spa is focused on the principles of aqua tranquility that has a history dating back to Ancient Greece. The Spa has established full sensory spa rituals to ensure total and purifying rejuvenation. Some

of the soothing and relaxing treatments offered include a "Honey and Orange Uplift", "Vanilla Coconut Exfoliation", a "Chocolate Souffle Wrap" and an array of other treatments. The Pantages Spa invites you to surrender your stress and empower your soul.

CSIP Workshop & Retreat Package Pricing:

Price including taxes per individual member participant:
\$1600.00 (single occupancy only)

Pricing Includes: CSIP program & materials, accommodations, meals - wine with dinner and all scheduled group activities.

Pricing Excludes: Spa treatments, incidentals, alcohol other than wine provided at dinner and hospitality suite.

Cancellation Policy: Customer Service Workshop & Retreat registrations are not refundable. Registrations can however be transferred to another broker within your brokerage office.

Registration: Space is limited for the CSIP Workshop & Retreat to the first 30 registrants. So register soon!

Register online in the members section of the IBAO website www.ibao.org or submit a registration form with payment directly to IBAO, 1 Eglinton Avenue East, Suite 700, Toronto, Ontario, M4P 3A1 or fax to 416-488-7526

Registration Deadline: September 30th, 2010 - subject to availability.

More Information: Contact Jennifer Lewis at jlewis@ibao.on.ca or at 1-800-268-8845 or 416-488-7422 ext. 119.

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Register Online at www.ibao.org

NAME: _____ RIBO NUMBER: _____
POSITION IN BROKERAGE: CSW/BROKER PERSONAL LINES MANAGER NUMBER OF YEARS OF BROKERAGE/INDUSTRY EXPERIENCE _____
BROKERAGE NAME (if applicable): _____ MY BROKERAGE IS AN IBAO MEMBER: YES NO
ADDRESS: _____ CITY: _____ POSTAL CODE: _____
EMAIL: _____ PHONE: _____ FAX: _____
GUEST ROOMS ARE NON-SMOKING ONLY
SPECIAL REQUIREMENTS / FOOD ALLERGIES: _____

FEE ENCLOSED: Total Fee Per Person, including Taxes \$1600.00 (single occupancy only)
Full payment must accompany registration form, to be paid by (please check one):
 COMPANY CHEQUE CERTIFIED PERSONAL CHEQUE MONEY ORDER VISA MASTERCARD
If paying by credit card please complete below

CREDIT CARD NUMBER: _____
BANK: _____ EXPIRY DATE: _____
CARDHOLDER'S NAME: _____ SIGNATURE: _____



Tel: 416-488-7422 Return to: IBAO, 1 Eglinton Avenue East, Suite 700, Toronto, Ontario M4P 3A1
Fax: 416-488-7526 TOLL FREE: 1-800-268-8845 Website: www.ibao.org E-mail: contact@ibao.on.ca

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"The CSIP program provides great learning to take back to the office and apply. As someone new to the industry, I now feel much more confident in my role". Lori Bigelow, Service Team Leader, Advocate Insurance Group.

IBAO is pleased to offer its eighth annual Customer Service for the Insurance Professional (CSIP) Workshop & Retreat. It has been developed specifically for your top performing CSR or Personal Lines Manager.

This 3 day workshop and retreat gives you the opportunity not only to educate but reward your top performing CSR or Personal Lines Manager. It provides an opportunity to step away from their hectic day-to-day brokerage activities to learn the "best practices" of the CSIP program, fine tune their customer service skills and network in a relaxed setting.

During this interactive CSIP Workshop & Retreat, participants will complete the four part Customer Service for the Insurance Professional Certificate. The customized workshop will focus on the key subject areas of interest in each module as indicated by the participants in a Pre-Workshop Needs Analysis.

CSIP deals with the critical service role of the Customer Service Representative. It looks at every aspect of brokerage operations from a customer service perspective and focuses on the exact job functions of those who deal with your clients. The program will help ensure that your office maintains a consistent, high quality customer service approach in all market conditions.

Along with the excellent learning opportunities, we will provide a balance of time for fun and networking. Starting with a night at the theatre, there will be other exciting group activities and evening entertainment throughout.

CSIP Program Outline:

Module 1: The Role of the Broker

RIBO Personal Skills Hours

- ❖ Quality Service and its Benefits
- ❖ Client Expectations
- ❖ Client Service Roles
- ❖ Communication Skills



"A great informative event for all levels of experience. Should be a must for everyone!"
CSIP Participant, Nov. 4-7/09
Huntsville, Ontario

Module 2: Adding Value to Your Brokerage

RIBO Management Hours

- ❖ Selling Skills
- ❖ Client Negotiation
- ❖ Public Relations
- ❖ Time Management



"Fabulous 3 days! I thoroughly enjoyed meeting and discussing ideas with so many extraordinary people. I feel I can accomplish so much more now that I am filled with so many great ideas."
CSIP Participant, Nov. 4-7/09
Huntsville, Ontario

Module 3: Brokerage Operations

RIBO Personal Skills Hours

- ❖ Automation
- ❖ Office Procedures
- ❖ E&O
- ❖ Money Handling

Module 4: Industry Issues

RIBO Management Hours

- ❖ The Broker and the Law
- ❖ Inadequate Coverage
- ❖ Role of the Government
- ❖ Career Development



"I really enjoyed the whole experience. I met wonderful people & learned so much from everyone!"
CSIP Participant, Nov. 4-7/09
Huntsville, Ontario

View Video Testimonials at www.ibao.org

Event Facilitator:

Beverly Russell

Ideal Solutions Insurance Brokers Inc.

Sales Content Facilitator:

Derek Falconer

Campbell Roy & Eldridge Ins. Services Inc.

E & O Content Facilitator:

Hugh Fardy

The CG&B Group Inc.

Retreat Benefits:

- ❖ Reward and recognition for top performing CSR – a key factor in employee retention
- ❖ Program showcase opportunity for Personal Lines Manager
- ❖ Earn CSIP Certificate and 16.5 hours of RIBO Continuing Education in a fun, relaxed atmosphere
- ❖ Networking opportunity and chance to pick up great customer service ideas from other CSRs

Itinerary:

Check In - Wednesday, November 10th

- ❖ Check-in between 4:30 - 5:30 pm (pick up CSIP Retreat package)
- ❖ Group Dinner and Theatre Night – North American Première of the musical *"Priscilla Queen of the Desert"* 6:00 - 11:00 pm

Day 1 - Thursday, November 11th

- ❖ Session Runs 8:30 - 12:00 noon
- ❖ Group Lunch 12:00 - 1:00 pm
- ❖ Session Runs 1:00 - 4:00 pm
- ❖ Informal Downtown Walking Tour (participation optional) & Free Time to Enjoy the City 4:00 - 7:00 pm
- ❖ Group Dinner 7:00 - 10:00 pm

Day 2 - Friday, November 12th

- ❖ Group Breakfast
- ❖ Session Runs 8:30 - 12:00 noon
- ❖ Group Lunch 12:00 - 1:00 pm
- ❖ Session Runs 1:00 - 4:00 pm
- ❖ Free Time to Enjoy the City and Hotel Facilities 4:00 - 7:30 pm
- ❖ Group Dinner at the Award Winning 360 Restaurant at the top of the CN Tower 7:30 - 11:00 pm

Day 3 - Saturday November 13th

- ❖ Group Breakfast
- ❖ Session Runs 8:30 - 12:00 noon
- ❖ Group Lunch 12:00 - 1:00 pm
- ❖ Session Runs 1:00 - 3:30 pm
- ❖ CSIP Retreat Certificate and Closing Ceremony 3:00 - 3:30 pm