

2017

# YOUNG BROKERS CONFERENCE

hilton niagara falls + fallsview casino resort

COME TOGETHER JUNE 7-9

[www.ibao.org/young-brokers-conference](http://www.ibao.org/young-brokers-conference)

**EARLY BIRD DEADLINE MAY 12**



# #YBC17

Join us for our 13th Annual Young Brokers Conference June 7-9 in Niagara.

This year we're creating a top tier experience with the introduction of a team competition. Using the case study method, young brokers will engage in experiential learning, decision-making and strategic planning. They'll be provided with a description of a fictional brokerage (background, financials, office environment and business mix) and will be challenged to solve a realistic problem faced by brokers today. They'll work together to present a winning business case to our panel of esteemed judges for the chance to win a \$5,000 grand prize from our friends at Trillium Mutual.

Young brokers will go *Across the Industry*, learning best practices, prices and timelines from industry experts. Teams will create a strategy and build a plan to meet defined growth targets using the tools provided. This will form the foundation of the first ever YBC Team Competition, assisting young brokers excel in 2017 and beyond.

Annual favourites will of course be included. Travelers Canada is hosting a trivia pub night to kick things off, and our Tradeshow + Hospitality Night provides the opportunity to connect with our valued YBC sponsors and vendors.

Same great conference - better experience. See you there.

*Traci Boland*

Traci Boland  
IBAO President



# AT A GLANCE

**NEW TEAM COMPETITION** with a \$5,000 Cash Prize

**TRAVELERS CANADA** Opening Night Party

**PRESENTATIONS** by Kanetix, CSIO, Mitchell & Whale Insurance Brokers, Gore Mutual + The T-R Group

**TRADESHOW + HOSPITALITY NIGHT**

**BUDDY SYSTEM** Discount Rate

**8.5 MANAGEMENT HOURS**

## HOT TOPICS

### EFFICIENCY + TECHNOLOGY

- What's Available
- Implementation Timelines
- Cost

### CONSUMER MARKETING

- Brand
- Digital
- Community Involvement

### GROWTH

- Cost per Acquisition
- Sales Targets
- Sales Strategies

### RETENTION

- Technology
- Communication Tools
- Cost of Execution

### TALENT

- Attracting Talent
- Retaining Talent
- Creating Culture

## EXHIBITORS

### FALLSVIEW CASINO, GRAND HALL A

FIRST GENERAL	1
PRIMACO	2
IFS FINANCIAL SERVICES	3
INSURANCE INSTITUTE	4
COMPLETE RESTORATION	5
TRILLIUM MUTUAL	6
GUS	7
A.M FREDRICKS	8
AJG	9
THE GUARANTEE	10
GAME DAY INSURANCE	11
INTACT	12
GORE MUTUAL	13
HAGERTY CANADA	14
KANETIX	15
BCI	16
ECONOMICAL	17
FORTIFY NETWORK SOLUTIONS INC.	18
IBC	19
WAWANESA	20
NORTHBRIDGE	21
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PORTAGE MUTUAL	23
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ECHOLON	26
RSA	27
SERVPRO	28
K&K INSURANCE GROUP CANADA	29
RESTORATION1	30
EDDY HOME	31
KEAL	32

## WEDNESDAY JUNE 7

4:00-6:00PM

**HOTEL CHECKIN / REGISTRATION - Hotel Lobby**

**EVENT REGISTRATION & CASE STUDY PACKAGE PICKUP -  
Great Falls Ballroom Foyer, 2<sup>nd</sup> Level, Hilton Hotel**

6:00-10:00PM

**TRIVIA PUB NIGHT - Great Falls Ballroom, 2<sup>nd</sup> Level, Hilton Hotel**

Sponsored by **TRAVELERS** 

Finally a solution to relieve pent-up Jeopardy frustration. Host Travelers Canada will lead us through our first ever trivia night accompanied by drinks, snacks and great company.

## THURSDAY JUNE 8

7:30-8:30AM

**BREAKFAST - Grand Caffe, Main Level, Hilton Hotel**

8:30-9:00AM

**WELCOME REMARKS - Great Falls Ballroom, 2<sup>nd</sup> Level, Hilton Hotel**



TRACI BOLAND  
IBAO President

9:00AM-12:00PM

**ACROSS THE INDUSTRY - Great Falls Ballroom, 2<sup>nd</sup> Level, Hilton Hotel**

Learning best practices, how to leverage data and implement costs applicable to brokerage business cases.

THE ULTIMATE MARKETING MACHINE | Brought to you by **KANETIX.CA**



ANDREW LO  
President + COO  
Kanetix



KELLY EMERY  
Head of Kanetix Digital  
Kanetix

How do we know how to position ourselves in the market, and more importantly, how will it affect the ever-changing ways consumers want to be engaged? Andrew joins us to discuss general consumer marketing options, costs and timelines for creating a successful brand and digital presence.

FASTER + MORE EFFICIENT | Brought to you by **CSIO**



MONICA HANNA  
Business Analyst  
CSIO



MICHAEL SPIAR  
Broker Relations +  
Communications  
Specialist  
CSIO

Many technology options are available, and some brokers are seeing striking results, particularly in boosts to speed and efficiency. Learn what's available to brokers, what average costs are and what timelines for implementation look like.

# THURSDAY JUNE 8

## DON'T FLY BLINDLY



ADAM MITCHELL  
Owner  
Mitchell & Whale Insurance Brokers

Are you leveraging the data your brokerage collects by breaking down available growth opportunities? Learn how to calculate cost per acquisition, define sales targets and leverage sales strategies using sample costs, ultimately turning data into valuable insight.

## INCREASE CLIENT RETENTION, BOOST PROFITS



STEPHEN COREA  
Director of Sales & Business Development  
Gore Mutual

We know that 20% of our existing customers generate 80% of profits. However, many customer retention efforts leave a lot to be desired. Learn how to use personalization and technology tools to retain business, accurately measure efforts and understand the costs involved.

## INTERSECTION OF TALENT



TONY PILON  
HR Consultant  
The T-R Group

Behind every company, whether it's an international brokerage or the smallest startup, there's an intersection of talent. Learn how to create culture, hire the right mix of skills and personality and the costs involved in attracting and retaining top talent.

**12:00-1:00PM**

**LUNCH - Watermark Restaurant, 33<sup>rd</sup> Floor, Hilton Hotel**

**1:00-5:00PM**

**TEAM STRATEGY SESSION - Break-out rooms, as assigned**

Retreat with your team to your war room to discuss what you've learned and build a plan. Cases are unstructured problems where there is no right answer. The goal is to interpret and analyze, and determine a course of action. Each team will have access to: a facilitator, laptop + materials, snacks + libations.

Red Team = Lake Ontario Room  
Blue Team = Lake Superior Room  
Orange Team = Great Falls Ballroom, Section 1  
Purple Team = Great Falls Ballroom, Section 2  
Green Team = Great Falls Ballroom, Section 3

**6:00-10:00PM**

**TRADESHOW + HOSPITALITY NIGHT - Fallsview Casino, Grand Hall A**

Join over 30 insurance companies, vendors and industry partners at our conference tradeshow - the industry's gathering place for all who thrive in the business of insurance and want to get to know the future of the industry. Includes exhibits, dinner and live entertainment.

# FRIDAY JUNE 9

**8:00-9:00AM**

**BREAKFAST - Great Falls Ballroom Foyer, 2<sup>nd</sup> Level, Hilton Hotel**

**9:00-10:30AM**

**TEAM PRESENTATIONS - Great Falls Ballroom, 2<sup>nd</sup> Level, Hilton Hotel**

What's your action plan? Defend it with a persuasive, convincing and well-argued presentation to our panel of judges.



**DEBBIE COULL-CICCHINI**  
Senior Vice President  
Intact Financial Corporation



**TONY FILICE**  
Vice President, Personal Insurance, Ontario Region  
RSA



**LUCY HATHAWAY**  
VP Sales & Distribution  
Travelers Canada



**PAUL JACKSON**  
VP Sales, Marketing & Distribution  
Gore Mutual



**TOM REIKMAN**  
Chief Operating Officer  
Economical Insurance

**10:30-11:00AM**

**COFFEE BREAK / HOTEL CHECKOUT**

**11:00AM-12:00PM**

**EXECUTIVE ROUNDTABLE - Great Falls Ballroom, 2<sup>nd</sup> Level, Hilton Hotel**

Company executives will rotate through teams to discuss your strategy and provide valuable feedback.

**12:00PM**

**\$5,000 CASH PRIZE - Great Falls Ballroom, 2<sup>nd</sup> Level, Hilton Hotel**



PRESENTATION BY TRILLIUM MUTUAL



“

By working through this process, we hope young brokers learn to identify the parameters of a problem, articulate strategies of progress, evaluate courses of action and argue different points of view.

- Ryan Pursell, YBC President

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## FAQS

### Q: HOW WILL TEAMS BE DECIDED?

A: Teams will be created randomly, based on registration. Brokers with different backgrounds from different geographical locations will offer different views on interpreting data and determining strategy, adding to the learning experience.

### Q: CAN I SIGN-UP WITH A FRIEND AND BE ON THE SAME TEAM?

A: We will do our best to accommodate partnerships, but will only entertain team requests up to a maximum of two people. Group diversity is important (see above).

### Q: HOW MANY INDIVIDUALS WILL BE ON A TEAM?

A: Teams will have the same number of people, but that number will depend on how many people attend the conference.

### Q: HOW WILL JUDGES DETERMINE THE WINNING TEAM?

A: Common factors will be assessed, including:

- Successfully identifying and discussing Case Study issues and opportunities
- Developing a thoughtful action plan and list of recommendations
- Leveraging appropriate analytical tools to garner best results
- Presenting overall strategy in a professional, creative manner

### Q: HOW WILL PRIZE MONEY BE DIVIDED?

A: \$5,000 will be split evenly between members of the winning team.

### Q: DO I HAVE TO SPEAK IN PUBLIC?

A: No. While every group member is expected to participate actively in discussions and strategy, final presentations can be designated to a specific team member(s).

## REGISTRATION

### ALL ACCESS PASS

\$779 +HST before May 12

\$829 +HST after May 12

#### INCLUDES:

- Hotel Accommodations June 7-8
- Group Meals, Social Functions, Sessions + Materials

### ALL ACCESS PASS - NO ACCOMMODATION

\$510 +HST before May 12

\$560 +HST after May 12

#### INCLUDES:

- Group Meals, Social Functions, Sessions + Materials\*
- \*Does not include Accommodations

### BUDDY SYSTEM

#### FIRST / SECOND REGISTRANT

\$779 / \$550 +HST before May 12

\$829 / \$599 +HST after May 12

#### INCLUDES:

- Shared Hotel Accommodations June 7-8
- Group Meals, Social Functions, Sessions + Materials

### TRADESHOW + HOSPITALITY NIGHT

\$150 +HST before May 12

\$175 +HST after May 12

#### INCLUDES:

- Tradeshow + Hospitality Night (June 8 / 6:00-10:00PM)\*
- \*Does not include Accommodations

**REGISTER ONLINE AT:** [www.ibao.org/young-brokers-conference](http://www.ibao.org/young-brokers-conference)

**HOTEL ADDRESS:** Hilton Niagara, 6361 Fallsview Blvd., Niagara Falls, ON, L2G 3V9

**IBAO CONTACT:** Tracey Blouin, [tblouin@ibao.on.ca](mailto:tblouin@ibao.on.ca), 416.488.7422 or 1.800.268.8845 x118