

2020 AGENT FOR THE FUTURE AWARD

Application Guide



Thank you for your interest in applying for the 2020 Agent for the Future Award! The following offers practical advice for how to craft a compelling application, ideas for what types of information to highlight in your responses and inspiration.

The application includes seven questions, and usually takes about an hour to complete. While the online form allows you to pick up where you left off, we encourage you to draft responses in a word document before inputting online. This will help ensure your work is saved, allows you to review the application holistically and gives you an opportunity to send around to others in your agency before submitting.

The best responses will be clear, thorough, and bring in a digital angle. Responses should also offer enough detail to give judges a good understanding of your agency, approach and vision. The ideal word count is 150-250 words per question.

As much as possible, work to showcase the three judging criteria in each of your written responses:

- **Innovation** – what you are doing differently than other IAs
- **Creativity** – how and why you are doing things differently
- **Impact** – the results you've achieved or hope to achieve

Things to have handy as you fill out the online form:

- Agency information – address, website link, social media accounts, etc.
- At least one photo (and up to three photos) of your agency team
- Your agency's logo

In the below, you will find the full list of questions and sample responses as inspiration to help jumpstart your draft. Full responses should be unique to your agency and more thoroughly answer the prompt.

Have any questions? Please reach out to us at agentforthefuture@safeco.com!

1. Describe the program or strategy that best showcases how your agency builds deeper relationships with existing clients. What results has your agency seen because of that program or strategy?

- You have a fantastic new client welcome kit that is wowing clients and has generated 20 new online reviews in the last three months.
- You have a client communication schedule that has resulted in an increase in client retention and an uplift in business.
- You invested in a modern agency management system that is changing how your team works and allows your producers to spend more time prospecting.

- 2. What new digital marketing tools, channels or strategies has your agency adopted over the last year? What are some of the results your agency has seen based on these changes?**
 - You have a new content marketing strategy that has you averaging 1,000 more visits to your website per month.
 - You recently started using Instagram and have gained 300 new followers.
 - You use video blogging to answer commonly asked questions. You use Google Adwords to promote the content and have landed three new clients because of it.

- 3. How does your agency differentiate from others in your area? How has your agency evolved its mix of insurance products and services over the last year to better compete?**
 - You began offering new products like Safeco's RightTrack™ program that has allowed you to serve twice the number of millennial clients than you did a year ago.
 - Your agency has a wealth management team offering a holistic range of services to complement your PL business.
 - Your agency was the only one in your area to launch a program to support local businesses in reopening during COVID.

- 4. What digital transformation has your agency undergone to meet changing consumer expectations during COVID-19? How has this impacted your agency's long-term strategy?**
 - You adopted a new AMS that offers better analytics capabilities and you will be able to be more data-driven in the future because of it.
 - You launched a new chat functionality on your website that has been used by 20 new prospects.
 - Your agency reimagined the renewal process and started pushing customers to a self-service option. More than 300 clients managed renewals digitally this year.

- 5. What digital transformation has your agency undergone to meet changing employee needs during COVID-19? How has this impacted your agency's long-term strategy?**
 - You have been working fully remote since March and will now be hiring staff members outside of your local area to work remotely and help build a presence in a new geographic area.
 - You started working with a new text messaging vendor that allows multiple employees to communicate with customers and better allows your agents to disconnect from the office during vacation.
 - You have started offering more flexibility in work hours and have adopted Slack to make it easier for employees to manage their work on their own time.

- 6. In five years, how would you like to see your agency evolve? What steps or strategies are you taking today to get there?**
 - You want to see your agency be the first result on Google for consumers in your area seeking home insurance and have recently attended an SEO conference to learn more about what steps to take to get there.
 - You want your agency staff to be 100% work from home and recently hired your first fully remote employee.
 - You want to be the go-to agency for hospitality businesses in your area and have started a newsletter discussing issues in that industry.

- 7. If your agency were to be selected, what agency growth or innovation project would you like to implement with the support of the mastermind group and Liberty Mutual/Safeco's \$5,000 contribution? What results would your agency like to see?**
 - You want to adopt a new AI tool that would automate your website chat and free up 3 hours of your CSRs' time each week.
 - You want to hire a contractor to build out a new SEO strategy to help attract clientele in a new market you haven't served before.
 - You would invest in new video camera and set up to improve the production value of your videos and launch a new video Q&A series.

8. (Only for agencies interested in applying for the Emerging Leader category) Tell us the story of your agency: What is unique about how it was formed, what is non-traditional about how you operate, or how do you approach things differently? What generally accepted insurance industry standards, stereotypes or barriers are you breaking down? What is the future vision for your agency and/or the industry?

- You are a female-owned business that wants to support working mothers by offering flexible working hours.
- You are a fully digital agency that has never had a brick and mortar location. You are still building up business, but envision a day when you can hire remote workers all over the country and deliver insurance nationally.
- You are a minority-owned business that has a robust internship and apprenticeship program that works to support other minorities in entering the insurance field.

Within the application, you will also be asked to include links to the following. Not every agency will have links to everything, so please only provide links to sites where you have content.

Agency Facebook

Agency LinkedIn

Agency Twitter:

Agency Instagram:

Agency blog:

Online agency reviews:

Team photo on website:

Agency app:

Agency videos:

Agency client referral program:

Agency partner resources:

A link to a local media story about your agency:

Agency online quote request:

Agency self-service account management portal:

Any additional digital tools available to your customers, not listed above: