

2023 Agent for the Future™ Awards

APPLICATION GUIDE



Overview & Advice

Thank you for your interest in applying for the 2023 Agent for the Future Awards! The following offers practical advice for how to craft a compelling application and inspiration for the types of information to highlight in your submission.

This year's award application consists of three short essay questions. The submission form also includes a short prompt on advice for other independent agents to be used for promotional purposes only, along with some basic agency and contact info. *We anticipate it will take about an hour to thoroughly complete.*

While the online form should allow 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 and gives you an opportunity to send your submission to others in your agency before submitting. *To help get you started, a [blank submission form](#) has been included below along with the application questions and examples to help you kick-start the essay responses.*

The best responses will be clear, thorough and focused on how the nominee fits the category description. *Category descriptions can be found on the [award landing page](#) and an example of an [application from a past winner](#) is included below.*

Responses should also offer enough detail to give judges a good understanding of your agency, approach and vision. As much as possible, try to showcase the three judging criteria in your written response:

- **Innovation** – what you are doing differently than other independent agents
- **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:

- General agency information – website link, social media accounts, etc.
- Your agency's approximate annual revenue (if you are applying in the Outstanding Agency category)
- Responses to the essay questions in a word document

Have any questions? Please reach out to us at AgentForTheFuture@Safeco.com!

Example of a Winning Application

Essay response from the application of [Joshua Morey](#), president of the J. Morey Company and winner of the 2021 Agent for the Future Award for Outstanding Agency Overall.

Joshua Morey is a second-generation agency owner (The J. Morey Company, Inc.) and has tripled the size of the company in the past 10 months since purchasing from his father and uncles. Digital marketing and leveraging insurtech's have been a key source to this growth. Data is everything in the current environment and the better we know our internal metrics, the better we can plan the future. This revelation led the company to create their own insurtech platform (www.kodoinsure.com) which helps benchmark real time agency data for actionable insights.

Adapting to the changing digital environment of insurance is critical to the future of the company but more importantly, the Agent of the Future needs to remember the past. My Father and Uncle's created an incredible reputation in our Japanese American community and those values are the compass for the direction in which we grow. Everyday there's a new product, service, or platform being released and it's paramount that any future decision is rooted in the values of the company's past.

The J. Morey Company believes in the future of minority owned agencies. Many of these agencies lack a perpetuation plan and furthermore, don't want to sell their agency to someone who doesn't understand their cultural roots. Our company has experienced such explosive growth over the past 10 months because we understand these cultural roots, honor them, and perpetuate them into the next generation. Part of that process is to integrate acquired agencies into our current digital environment to help them stay relevant but more importantly to make sure we continue their legacies in their minority communities.

Diversity, Equity, and Inclusion are extremely relevant issues that every company in America is facing today. Our agency deserves to be considered as the Agent of the Future because we aren't just talking about these issues, but we are actively participating in its future. We believe in the future of minority communities and are doing our best to perpetuate those communities through insurance. The most recent example of this is the acquisition of Aihara and Associates, a 75-year-old firm in Little Tokyo, Los Angeles. The Aihara family have been pillars in the Japanese American community for 75 years and we're privileged to carry on their legacy. As they adopt our culture of innovation, we also honor their past.

Blank Submission Form

Overview of all questions included in the application

What category are you submitting for?

All agencies applying for the 2022 Agent for the Future, Outstanding Agency Overall category will also be considered for the Outstanding Small Agency and Outstanding Large Agency categories, based on revenue.

- Outstanding Agency
- Digital Innovator
- Outstanding Female Agency Principal
- Emerging Leader

Agency & Contact Info

For agency submissions, please list contact information for the person submitting the application. For individual submissions, please list contact information for the individual being nominated.

- Agency Name
- Agency Website
- Agency Headquarters City & State

- Nominee First & Last Name
- Nominee Email Address
- Nominee Phone Number
- Year Agency was Established
- For individuals, number of years in the insurance industry

What is your agency's approximate annual revenue?

- Less than \$2 million/year
- More than \$2 million/year
- N/A – I'm not applying for 2022 Agent for the Future, Outstanding Agency Overall category

Please provide links to all active social media pages, including a LinkedIn profile for individual submissions.

What is the makeup of your agency?

- Exclusively personal lines
- Mostly personal lines, some small commercial
- Both personal lines and small commercial equally
- Mostly small commercial, some personal lines
- Exclusively small commercial
- Other?

How did you hear about the Agent for the Future Awards?

- Social media
- Email
- Agent for the Future website
- My Liberty Mutual, Safeco or State Auto representative
- Other?

In less than 400 words, please describe the agency or individual and explain why this nominee deserves to win an Agent for the Future award. What makes the agency or individual outstanding?

This section is an opportunity to give an overview of what makes you or your agency stand out. Not sure where to start? Take a moment to reflect on your agency over the past few years and ask yourself what you've done differently than other agencies and how it has made you successful. Below are examples from past award-winning applications. Remember, these are just to help kick-start your own ideas.

Past winners told us how they or their agency had:

- *Adopted innovative digital tools to streamline the customer experience, and built a video production studio in their office to enhance their digital marketing efforts.*
- *Created an empowering workplace culture by rethinking workplace structures and allowing more flexibility.*
- *Transitioned to being fully virtual and remote, while still creating excellent experiences for clients.*
- *Built a pipeline for the next generation of talent by creating more entry-level positions and educating people in different communities about the opportunities in insurance.*
- *Partnered with minority-owned agencies to help lead DEI efforts in the IA channel.*
- *Developed a program to help other independent agents learn best practices for digital marketing.*

In less than 200 words, tell us how the agency or individual has demonstrated what makes them outstanding within the last year. Please provide specific examples, anecdotes, metrics and/or results to show the impact.

This section gives you an opportunity to dig into a particular program, initiative or innovation and show the impact it's had. For example, perhaps you or your agency has:

- *Found a niche or broken into a new market, which has helped the agency grow by XX% year over year.*
- *Launched a mentorship program in your agency or community, which has helped members ...*
- *Built an insurtech tool that has helped you gain actionable insights from agency data.*
- *Created an AI chatbot for your website, which has created XXX new leads and saved your team time.*
- *Invested in your workplace culture and DEI efforts, helping with employee satisfaction and retention.*

In less than 200 words, tell us how the agency is planning to evolve over the next three years, or how the individual is hoping to evolve the agency. What steps or strategies are they taking today to get there?

We've covered where your agency is today – where do you hope to go tomorrow? Examples for this one may be similar to those listed above, but future-looking, with action steps for how your agency plans to achieve the vision.

In a couple of sentences, please answer the prompt: What advice would you give to other agents that want to become an Agent for the Future?

This response will be used for promotional purposes only.

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