

# 2024 Agent for the Future™ Awards

## APPLICATION GUIDE



### Overview

Thank you for your interest in applying for the 2024 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.

The 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.*

### How to use this guide

- 1) **Explore the award category descriptions** on the [Agent for the Future Awards landing page](#), and decide which category (or categories) you want to apply for.
- 2) **Use the [blank submission form](#)** below to preview the application questions and see examples to help get you started.
- 3) **Read the [advice below](#)** on how to write a great award application, and read the [example of an application from a past winner](#).
- 4) **We recommend drafting your application responses in a Word document before submitting online.** While the online form should allow you to pick up where you left off, having a draft of your responses will help ensure your work is saved and give you an opportunity to send your submission to others in your agency before submitting.
- 5) When you're ready, [submit your application here](#).

Have any questions? Please reach out to us at [AgentForTheFuture@Safeco.com](mailto:AgentForTheFuture@Safeco.com)!

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### Advice on writing a great application

The best application responses will be clear, thorough and focused on how the nominee fits the category description. *Category descriptions can be found on the [awards landing page](#).*

Responses should 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

For tips on writing a winning award submission, read [this article from Fast Company](#), and read through the example of a winning application below.

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## Blank Submission Form

Overview of all questions included in the application

### 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

### What category are you submitting for?

All agencies applying for the 2024 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
- Agency Principal First & Last Name
- Agency Principal Email Address
- Nominee First & Last Name
- Nominee Email Address
- Nominee Phone Number
- Year Agency was Established
- For individuals, number of years in the insurance industry

### Agency name as you would like it to appear on the trophy

### 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 the 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:*

- *Created a proprietary agency management system to fit the needs of the agency and streamline the customer experience.*
- *Created an empowering workplace culture by rethinking workplace structures and allowing more flexibility.*
- *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.*

**Agree to the terms & conditions**

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## Example of a Winning Application

*Essay response from the application of Jay Mueller, CEO of Camargo Insurance, winner of the 2023 Agent for the Future Award for Outstanding Small Agency.*

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

Five years ago, Camargo was torn down and rebuilt. That included process, tech, people and even its physical office. The agency's leadership was not satisfied with single-digit growth and wanted to build a foundation that would set Camargo up for decades of future success. The restructuring process included moving from the suburbs to a new office downtown near local universities to help recruit top talent; creating and implementing an integrated AMS-CRM environment to manage workflows, create custom, tailored experiences for their clients, and generate the right data needed to manage a rapidly growing business; placing digital dashboards on the office walls to transparently track leading and lagging indicators; building out HubSpot for marketing; and most importantly, recruiting a diverse team that has helped Camargo continue to exceed its growth goals.

Camargo's commitment to staying ahead of the technology curve to meet client and business demands is complementary to its advisor-focused, human-first approach. The agency's vision is to create a world in which we all live our best lives, by making powerful life decisions that transcend fear of loss. Camargo's product, insurance, is of course critical to achieving that vision. Its people, however, are the key component. Technology is simply a tool that helps the Camargo team execute on its mission.

Camargo makes it a point to stay focused on its own unique value, which is decidedly different from that of large, tech-first competitors. Camargo strives to learn from these larger, well-capitalized agencies, including the tools they are using that could help support Camargo's vision, but Camargo does not strive to be them. Camargo's customers value quality insurance and professional advisors. Technology simply provides tools to help Camargo's team meet those customers where they are, and deliver a modern, efficient experience.

The result of Camargo's investments in people, process and technology generated four consecutive years of 20%+ organic growth. This growth created new opportunities and challenges. It became clear that the organization could greatly benefit from experienced C-suite-level leadership. For many agencies, experienced, executive-level leadership is cost prohibitive. The solution for Camargo has been fractional leadership. Fractional CFO, CMO, COO & sales leaders have helped the organization with its immediate leadership needs while coaching up young leaders who will carry Camargo Insurance into the future.

**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.**

Growing an agency is no different than growing any other business. Camargo's work with Entrepreneurs Organization (EO) and The Goering Center has helped Camargo get outside of the industry dialogue and think differently about running an insurance agency. One key initiative that both of these organizations helped lead Camargo to is the creation of an advisory board. Camargo's board includes powerful business leaders with expertise in finance, M&A, fin-tech, operations and sales leadership.

Within six months of the first board meeting, Camargo implemented EOS (Entrepreneurs Operating System) and hired a fractional CFO. It became clear that to get the most out of the board, Camargo needed more structure and better financial reporting. EOS created clarity across the entire team around Camargo's vision, plan and priorities. It also helped create a leadership team with clear accountability to manage each business function along with KPIs for each leader and the function they are accountable for. The fractional CFO helped Camargo align financial reporting with Reagan's best practices. The combination of benchmarked financial reporting and a leadership team with clear lines of authority, along with an advisory board assisting with strategy, has allowed Camargo to continue to break through growth ceilings.

**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 their agency. What steps or strategies are they taking today to get there?**

To achieve Camargo's five-year EBITDA goal of \$1,000,000, it must continue to exceed best practices growth metrics while maintaining a focus on culture, including DEI.

The key ingredient that allowed Camargo to break free from decades of stagnation was its focus on building a sales team. Camargo's three-year plan includes doubling the size of its sales team while reducing producer validation time. Multiple initiatives focus on this goal including deepening relationships with universities, hitting internship targets, improving lead scoring to shorten the sales cycle while increasing average deal size, and continuing to refine sales training.

Camargo is proud of its diverse, dynamic team and believes commitment to Diversity Equity and Inclusion paves the way for a vibrant and innovative future. Camargo's team includes native speakers of four languages, multiple first-generation Americans, and a multitude of backgrounds. Women represent more than 50% of the agency's leadership team, advisory board and sales team. As Camargo grows, key functions that affect DEI such as recruiting and management will continue to be delegated from ownership to key leaders. The creation of a formal DEI plan is important to ensure DEI continues to be embedded into Camargo's operations and culture.