**GENERAL INFORMATION:**

**Case studies:** To be submitted using this template form. Entries to be no longer than 750 words and submitted in PDF format.

**Stats & Testimonials:** All submissions should include stats and testimonials as supporting evidence (to be supplied in PDF format).

**Award Category Definitions:** Details can be found at the end of this document.

**Company Logo:** Please submit a Hi-Resolution image of you company logo along with this form

**YOUR ENTRY SUBMISSION:**

|  |  |
| --- | --- |
| Award Category: |  |
| Name and email of nominee (if individual award) |  |
| Company Name: |  |
| Name of person submitting award entry: |  |
| Email address of person submitting award entry: |  |
| Who will collect the award at the event? |  |
| Social media account (for social media entries only): |  |
| Links to relevant posts (for social media entries only): |  |

Please tell us, in no more than 750 words, why you should be considered for this award category:

|  |
| --- |
|  |

**AWARD CATEGORY DEFINITIONS:**

# Individual Adviser Awards:

* **Best claim case study by an adviser**

*A case study from an adviser demonstrating how they have supported the client during a claim. We are looking for submissions which highlight how the adviser has supported the claimant and what impact this had on the client.*

* **Best use of video social media by an adviser**

*Examples of use of video in social media by an adviser to promote protection. Entrants must demonstrate the level of engagement achieved, how this has had a positive impact on their clients and business and/or how they have reached people they might not have had contact with otherwise.*

* **Best use of static social media by an adviser**

*Examples of use of text/image based social media by an adviser to promote protection. Entrants must demonstrate the level of engagement achieved, how this has had a positive impact on their clients and business and/or how they have reached people they might not have had contact with otherwise.*

* **Outstanding new protection adviser (individual – entered industry in last 24 months)**

*Entry is limited to individual advisers who have entered the protection industry in the last 24 months. Entrants should demonstrate how they have achieved their qualifications, grown their client base and can highlight how they have helped increase protection sales in their firm and produced great customer outcomes.*

* **Best protection administrator/support staff**

*How an administrator/member of support staff has gone the extra mile to support their firm’s advisers and clients, how they have made an impact to the business and how they have helped achieve better client outcomes.*

* **Outstanding training & development leader**

How an individual has gone above and beyond to provide protection training to advisers. This can be on sales, underwriting, product knowledge or anything else related to protection. We would love to see evidence of impact the training has had on the recipients.

# Adviser Firm Awards:

* **Best marketing of protection from an advice firm**

*Entries will highlight how an advice firm has used social media, email campaigns, online advertising etc. to promote protection to a wider audience. Submissions will demonstrate how the campaign has improved awareness of the need for protection and increased.*

* **Best Network**

*Submissions will demonstrate how the network has supported their members to provide better protection advice by delivering training, support materials etc. and how they have grown the level of protection business carried out within their member firms.*

* **Best protection support group/compliance service**

*Submissions will demonstrate how the support group/compliance service has supported their members in providing better protection advice by delivering training, support materials etc., and highlight how they have delivered better consumer outcomes.*

* **Best protection advice from a mortgage brokerage**

*Demonstration by a mortgage broker of how protection advice is embedded into their processes, how they ensure protection is discussed with every client (and that discussion is followed through) and how protection plays a role in their ongoing servicing of clients.*

* **Best innovation from an advice firm**

Demonstration of a new and innovative implementation of technology or campaign that has really made a difference to your firm or your clients. We want to hear about why the innovation was needed and the practical impacts it has made.

* **Best training initiative**

An example of a training program or scheme that has been put in place to bring new advisers into the market or train existing advisers on how to give protection recommendations. We want to hear about the people that have gone through the training and the outcomes that have led to more and better protection advice.

* **Protection advice firm of the year**

*Submissions will demonstrate how the firm has supported their advisers to provide better protection advice by delivering training, support materials etc. and how they have grown the level of protection business across their advisers.*

# Insurer Awards:

* **Best use of social media from a BDM**

*Demonstration by a BDM of how they are using social media to help support, educate and inform advisers and promote the products of their company. We would like to see evidence of reach and engagement.*

* **Best claim video from an insurer**

# *Demonstration by an insurer of how they are using social media to promote protection claims stories to a wider audience. We would like to see evidence of the reach of campaigns outside of the industry and how the insurer is using different social media channels to achieve this.*

# Technology Awards:

* **Best financial planning or cash flow system for protection**

*Particular attention will be paid to how the tool can support protection needs of a consumer.*

* **Best mortgage & protection CRM**

*The judges will give particular consideration to how the CRM addresses protection products within their system.*

* **Best AI for financial advice**

*This category will explore systems that assist advisers with onboarding new customers, their compliance obligations and/or annual reviews.*

# Prestige Awards:

* **Best growth in protection advice**

*Evidence of how a firm have grown their protection advice across the firm or network. Entries will highlight the steps that were taken to ensure protection is at the heart of every adviser’s advice, evidence in terms of volumes of business during the growth period and the percentage of protection business compared to other lines.*

* **Above & Beyond Award**

*Demonstration by an adviser or adviser firm of a situation or actions where they have gone above and beyond in supporting their client and achieving an excellent consumer outcome. This can be in helping them get cover in the first place, supporting them keep cover in place or even supporting them through a claim.*

* **Outstanding performance in claims handling**

*Demonstration of an individual adviser, adviser firm or insurer of exemplary process, performance and actions with regard to handling claims in order to achieve outstanding client outcomes, either on an individual case or across all claims.*