



**Broker Marketing
Academy**
2019 Marketing Camp

2019 Marketing Camp

An exclusive experience
for CAA Insurance Brokers

Powered by  **Insurance**
COMPANY



Ask yourself the following...

1

Do you want insights into how to measure your marketing effectiveness?

2

Is multi-channel marketing part of the overall strategy for your brokerage?

3

Do you want to maximize your brand and value proposition in all customer touch points?

4

Do you want the opportunity to collaborate with people who have the same goals and challenges as you?

If you answered YES to any of the above,

the Broker Marketing Academy
is for you.

There are product and sales seminars that can be found quite easily, but what Brokers have said and the industry has identified is a current gap in marketing programs for Brokers.

Marketing provides a platform for Brokers to promote and advertise their services while at the same time hoping to break through the clutter.

With this in mind, CAA Insurance has collaborated with marketing experts to develop a new academic program that will provide CAA Brokers the information and tools needed to move their business forward and provide insights and learnings from the industry leaders that can be easily integrated into a marketing plan.

Welcome to the Broker Marketing Academy. This exclusive program has been designed to bring together our CAA Brokers with a group of marketing experts that are forward thinking and well versed in the application and business of marketing.

Successful applicants will walk away with insights, learnings and best practices that can easily be applied to any marketing plan and take it to the next level.

Our goal is to provide our distribution partners with what they need to reach not only the customers of today but prepare for the customers of tomorrow.

The Camp is sponsored by:





Be at the forefront of our first session, 2019 Marketing Camp.

Learn in-depth principles of integrated marketing and apply them to a case study while creating a marketing plan framework that you can bring back to your business.

Space is limited to 15 participants in order to provide the ultimate learning experience. Brokers interested will be asked to complete an application.

Applicant Profile

The Marketing Camp is designed for:



Marketing Managers currently responsible for the marketing strategy and execution wanting to further develop their expertise through practical learning and collaboration



Those transitioning into a new marketing responsibility and are ready to take on a more senior marketing role



Experienced marketing leaders new to the insurance industry



Principals and office managers wanting to invest in new and innovative marketing opportunities

Reasons to Apply

Time Well Spent

CAA Insurance is committed to ensure that this time away from the day to day routine will provide focus on new and relevant information and insights that easily translates into your marketing plan and provides an integrated and effective marketing journey.

That's our promise to you.

Collaborate with Marketing Leaders

We have partnered with dynamic and creative marketing leaders with industry expertise to provide the framework and structure needed to move your marketing strategy and plan forward.





Strategic Advice

Make the right decisions quickly and with confidence. Our team of experts on all things brand, integrating digital and traditional marketing, marketing automation and the business of marketing bring insights, learnings and interactive activities providing the tools and framework that can be easily applied to your marketing strategy.



Practical Tools

Deliver measurable results through assessment, implementation and execution. We will partner with Marketing Camp participants from plan through to execution to help bring the learnings to life and ensure success before, during and after.

New partnerships will be formed and continue long into the future as a result of this program.

An aerial photograph of a university campus, likely the University of North Carolina at Chapel Hill, showing several large, multi-story brick buildings, a large green lawn, and a body of water in the background. The image is overlaid with a semi-transparent orange filter.

**Why are we
doing this?**

Why are we doing this?

To provide learning in a unique and non-traditional way.

Brokers are under pressure to continuously position their brokerage in today's complex multi-channel environment with limited opportunity for marketing development.

That's why we created the Broker Marketing Academy and sourced industry experts to bring the business of marketing to CAA Brokers wanting to take marketing to the next level.



Brokers are challenged to remain current and competitive in a space with emerging trends, technologies and talent.

Facilitated by industry experts, this program will prepare participants with the knowledge, skills and strategies needed to bring their marketing plan to life. Brokers attending this program will build on their marketing foundation and effectively lead their brokerage to define, create and execute a successful integrated marketing plan.



What's in it for me you ask?

The practical examples and learnings you leave with can be easily applied to your marketing strategy through creation of an integrated marketing plan that will provide targeted results and continued learnings.

You will have access to our experts for future follow up for continued support along with partnership with CAA Insurance on marketing campaigns through funding.

We will also be working to obtain management education credits for this program that you can apply to your learning requirement.

Key Topics

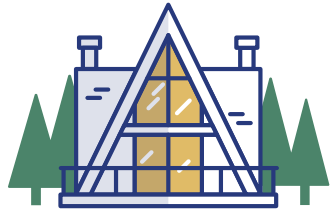
- 1 Bringing Your Brand to Life**
Defining your brand and targeting your audience
- 2 Traditional Marketing**
Test and learn principles applied to direct mail.
Delivering the right product to the right person
at the right time through segmentation
- 3 Exploring Digital Capabilities**
Digital awareness and literacy along with the
value of SEO and SEM

- 4 Marketing Automation**
Leveraging tools and technology in lead
generation and customer marketing
- 5 Business of Marketing**
Hiring the right agency and marketing
talent to bring your marketing plan to life
- 6 Evaluating Costs and ROI**
Marketing build vs. marketing spend

Marketing Camp 2019 will take place from

September 30 to October 4, 2019





Location

Deerhurst Resort offers stunning natural beauty and modern comfort.

Embracing Peninsula Lake, Deerhurst Resort is our retreat for work and play in Ontario's famous "cottage country". With 750 acres overlooking picturesque Peninsula Lake, Deerhurst offers lots of opportunity to work and relax in the beauty of Muskoka.



Meet the speakers



Brand Heroes

Mike Leon is an award-winning Digital Marketing and Branding Professional with almost twenty years experience in the Canadian and International Markets.

As President and founding partner of Brand Heroes Inc., Mike is responsible for the firm's strategic direction and can be credited with building Brand Heroes into a leading boutique brand storytelling agency, with a national client list that includes post secondary, healthcare and regulatory organizations.

Over the course of Mike's career, he's advised and created campaigns for some of the world's most dynamic brands including CAA, Microsoft, Mattel, Intel, Rogers, YT, The Toronto Maple Leafs, and more.

In-demand as a speaker, Mike frequently delivers talks on the power of personal branding, digital marketing and brand storytelling. Mike is also the on-air marketing expert for Global Radio Toronto AM 640 where he provides live commentary on a variety of marketing issues and branding issues. Mike has provided live commentary on everything from the brand implications of sex scandals to the PC Leadership race.

Mike holds undergraduate degrees in Communications and Political Science, a diploma in Television Broadcasting and an MBA in Marketing. Mike is also a Part-time MBA Brand Management Instructor in the Lazarus School of Business and Economics at Wilfrid Laurier University and when he's not saving brands, can be seen trying to save himself embarrassment as a stand-up comedian.

CAA Insurance

Brent Closs is a marketing communications professional whose career is built upon hard work, practical thinking and most importantly, an education in the Fine Arts. Successful marketing, like successful art, influences the audience to behave in the way you intend.

Brent has led several large-scale rebranding projects, dozens of product and service launch initiatives, technology integrations, and a wide variety of other marketing programs.

This is what Brent's really good at:

- Guiding companies through transformational change, especially building and reinventing brands
- Making complex topics simple to understand
- Building high performing teams that drive B2B marketing success while still keeping the end-user at the heart of all strategy
- Driving content marketing and consumer education programs

Brent started in marketing as a graphic designer so he knows how to build a brand from the outside in, starting with the customer.

directworx

Dan Schottlander is President and CEO of directworx and gratiflow. With over 25 years as an entrepreneur in the direct mail marketing industry, he's been at the forefront of combining "tactile with technology" to drive consumer behavior while providing insight to the marketer.

From being the first in the industry in Western Canada to install a computer for data management (1980) to launching the first e-Gift based incentive fulfillment platform of its kind last year, Dan relentlessly pursues automation that enhances the channel. As a Canada Post Expert Partner, directworx is a leader in facilitating turn-key targeted communications through direct mail. Its success can be traced back to Dan's simple 3-step strategy to first solve customers' problems, then make them look great, while ensuring it's ridiculously easy to do business together.

Dan is a past President of the Burlington Junior Chamber of Commerce, a Senator of Junior Chamber International and a founding member of The Executive Committee (TEC) in Hamilton. His weekends are enjoyed at the family cottage snowmobiling, fishing, chasing grandchildren or solving the world's problems around a campfire!

Goose Digital

Michael Tuscanyi, Goose Digital CEO
Michael is a celebrated tech entrepreneur based in Toronto, Canada.

He has successfully founded, grown, and sold hosting and ecommerce businesses in his career to Canada Web Hosting (Tenzing) and eCommera (Dentsu Aegis).

Michael is regarded as a thought leader and top conference speaker on critical subjects like digital transformation, accelerating growth, end-to-end customer journeys, integrating back office systems with modern front office technologies, and aligning sales and marketing.

Michael founded Goose Digital to improve adoption of marketing automation and other marketing technologies while accelerating value and impact through expert knowledge and deep digital marketing experience.

Jennifer Pugsley, Goose Digital Director, Client Services, Jennifer's expertise in insurance is a result of 12+ years as a direct writer, carrier and broker in well respected organizations like CMB Insurance Brokers, Canada Brokerlink (Intact), and Canadian Direct Insurance.

Jen's unique understanding of the insurance industry and cutting edge digital marketing technologies and tactics make her a "must know" for insurers navigating omnichannel marketing experiences, engaging audiences, and accelerating revenue growth. Jen leads Goose Digital's insurance practices and represents clients such as CAA, Navigators Insurance, Hull Group among others.

Overdrive

James Wilson founded Overdrive over 30 years ago with a passion for design, respect for Swiss type and exacting attention to detail. Having found an outlet for his unbridled enthusiasm he hasn't looked back since.

Under James' direction, Overdrive has been recognized for design excellence with over 100 national and international awards to its credit, servicing clients from a diverse range of disciplines.

James studied at both York University and the Ontario College of Art and Design and has taught Electronic Media at Sheridan College. He is also an illustrator and fine artist, active member of the industry's professional body for accreditation: the ARGD, is a founding member of the association of Green Designers and the Communication and Designers Association of Toronto, and is in discussions with other stakeholders to launch a Design Association in Hamilton. James is a frequent guest speaker at various associations, Universities and Colleges with respect to brand and interactive media and is on the Program Advisory Committees for the school of Media and Design at Conestoga College and just recently, for the advanced diploma programme for Graphic Design at Mohawk College.

In his copious spare time, James is a committed cyclist (a lifestyle, not a pastime) and has an ongoing interest in the exports from the Scottish region of Islay.

How to Apply

You can apply to the program by completing an application at caabrokermarketingacademy.ca for consideration. Space is limited to 15 participants to provide the ultimate in class and interactive learning experience.

The application process opens May 21 and closes on June 28 with the final attendees notified the week of July 29. CAA Insurance will take care of all food, accommodation and conference expenses.

Participants are responsible for their own travel, transfers and incidentals.



Brokers will be asked to complete an application with a variety of questions that include:



Your work
history



Your
interests

Curious to learn more?

Speak to your Business Development Manager