



NAILBA Strategic Plan

2017-2020

Approved 3.31.17

NAILBA's Core Purpose:

The premier insurance industry organization promoting financial security and consumer choice through the use of independent brokerage distribution.

NAILBA's Core Organizational Values:

- Community
- Independence
- Entrepreneurial
- Innovative
- Integrity
- Leadership
- Excellence

NAILBA'S Vision:

NAILBA is essential to the future success of independent distribution.

Goals and Objectives

BGA Education

Goal: NAILBA's education program is utilized, relevant, known, and impacts members' success.

Objectives:

1. Increase relevance (content and delivery) of educational opportunities to members' success.
2. Increase awareness and understanding of the value of educational opportunities.
3. Demonstrate the impact of educational content and members' success.

IMO Alignment

Goal: IMO's recognize NAILBA as critical to their future success.

Objectives:

1. Increase consistent communication between NAILBA and IMO leaders.
2. Increase NAILBA membership through IMO relationships.
3. Increase awareness of NAILBA value to IMO organizations and their members.
4. Increase advocacy on behalf of IMO's to carriers and others.

Annual Meeting

Trade Show Goal: Annual Meeting provides more opportunities for interaction between members and carriers/vendors.

Objectives:

1. Change format to more "study group"/small group discussions.
2. Increase unopposed idea exchange time.

BGA Education Goal: Annual Meeting Provides relevant education for members.

Objectives:

1. Increase number of idea exchange/best practices workshops.
2. Increase education portion of annual meeting budget to bring in experts in practice management.
3. Evaluate change of schedule/length of Annual Meeting.

Grow Membership

Goal: Increase quantity of member agencies.

Objectives:

1. Expand membership penetration into independent distribution of other products.
2. Increase membership penetration within IMO's .
3. Expand dedicated resources to membership growth.
4. Increase carrier and vendor cooperation in membership growth.

Carrier Relationship

Goal: NAILBA is perceived by carriers as the hub of independent distribution which is critical to our industry's success and the dominant way their products are sold.

Objectives:

1. Increase support for Annual Meeting revenue and attendance by making meeting more valuable.
2. Increase communications between NAILBA leadership and carrier decision makers to every other month throughout year.

3. Achieve IMO loyalty to NAILBA.
4. Reduce redundancy by leading the way with association alignment.
5. Increase alignment of carrier content push to IMOs and members.
6. Demonstrate evidence of the importance of independent distribution to carriers.
7. Increase understanding of the roles between carriers and independent distribution.