



# Newsletter

April 2013

*To support and strengthen our membership: credit union owned insurance subsidiaries*

## Michael Harrison comes to the CUISA Conference

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Michael Harrison is an extraordinarily talented ventriloquist, puppeteer, and comedian. He has worked alongside numerous acts from the Muppets to Boyz to Men. Michael combines all of his talents: comedy, juggling, magic and ventriloquism into a unique and fun filled variety show.



In 2008, Michael was a finalist on America’s Got Talent, Piers Morgan said “I was determined not to like you, but it was brilliant. I have never seen that happen with a ventriloquist. The audience loved you, we loved you, and it was a great act.”

**Michael Harrison, Comedian and Ventriloquist**

Michael Harrison will be performing at the upcoming CUISA Conference at the Westin Bear Mountain. For registration, please visit the CUISA website at [www.cuisa.com](http://www.cuisa.com)

### 2012 Board

- Shelly Maurer, President
- Kevin Sigouin, Vice Chair
- Cindy Schiller, Treasurer
- Lesley Maddison, Director
- Lynda Mantler, Director
- Michael Henfrey, Director
- John Sullivan, Director

## Corporate Partner Spotlight—Optimum West

Optimum West in support of its commitment to providing new and innovative commercial lines products is currently releasing three new OptiPak products to compliment the OptiPak Retail Package.

The three new products are: the OptiPak Clinic for health and personal care clinics, the Optipak Professional Services for offices, and the OptiPak Contractor designed for eligible sub-trades.

All three products have competitive coverage and pricing and can be sold either as a “package” type or the broker can pick and choose the coverage they want.

Optimum Commercial Underwriters will automatically qualify and quote eligible risks and a company specific application is not required.

## ICBC Committee Updates

The CUISA Board has been hard at work on various committees, here is an update

### Broker Customer Experience Award

The targets have been set for 2013!

The Customer Experience target will now be at 62%, this matches the ICBC Insurance Division target, and is a 1.7% increase from 2012 year end.

The Service Attribute Target is now 78.1% this is based on the average increase over the prior two years and is a 1.8% increase from 2012 year end.

While award components remain the same year over year, the weightings have changed. Brokers on the committee were instrumental in seeing the Customer Experience weighting reduced from 40% in 2012 to 20% in 2013. Service Attribute weighting went from 40% in 2012 to 70% in 2013 and Broker Activity weighting went from 20% in 2012 to 10% in 2013.

### Insurance Sales and Administration System

The committee has been diligently working through the pieces on this large project and now is at a pause as ICBC goes through the final process for selecting the successful vendor. CUISA will be providing members as part of a "Working Group" who will be closely involved with interfacing with the new system. Broker involvement at every level is critical to the success of this project and your Association is ensuring that CUISA is at the table.

### Broker Education Committee

The Broker Education Committee, after a short hiatus has been restructured to look at the development, implementation, delivery and evaluation of an effective education strategy. The goal is to incorporate the existing strategies from 2008 and 2010 and align them with current priorities.

It has been a very engaged committee with many ideas put forward and discussed. One of the recommendations put forward by the committee is that ICBC create a "Learning Path" for new agents, a step by step guide that agents and supervisors can use with staff to structure their ICBC education. If you have ideas that you would like to see brought forward please email them to [cuisa@central1.com](mailto:cuisa@central1.com).

## Did you know

The Liaison Committee mandate is to review systems, process and procedural issues that you may be having with ICBC.

If you are struggling with a specific issue, bring it to us! Your Board is here to ensure that your concerns are brought forward.

Your issues may be forward to our Liaison Rep at [sbelanger@aldergrovecu.ca](mailto:sbelanger@aldergrovecu.ca) or [cuisa@central1.com](mailto:cuisa@central1.com)

We are here to help!

## Liaison Corner



Sharon Belanger, Aldergrove Insurance Ser. Ltd.  
CUISA Liaison Representative

Next Liaison meeting is scheduled for May 14, 2013

# One last word...

Just a reminder regarding our Job Board, please encourage your human resources department to use it, it's free and it supports the Association.

Also, please review our membership directory and forward any changes necessary to the Association to ensure that your information is current and correct.

Check out our website! We are continually making changes and would love to hear what you think!



## Important reminder about Document Retention RFI

Document retention has now been reduced from five and seven years to three years from the expiry date. A Request for Information (RFI) was sent to broker principals in order to help determine the amount and location of documents that can be securely destroyed as a result of this change. If your office has not submitted the RFI which was due March 11, please do so as soon as possible. This is a positive change for brokers and your board representatives have diligently kept this issue on the table. Please ensure that your office can utilize this opportunity to reduce your operating costs.



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*The CUISA Association's core purpose is to promote and protect the interest of our members, the interest of the insuring public and the interests of insurers in all matters pertaining to the insurance business and related services.*

*This includes fostering and encouraging a high standard of ethics in the insurance business and related services, and to discourage all unfair and unethical practices. The association will encourage the study of insurance and related services to promote a better understanding on the part of its members and the insuring public.*

*On behalf of our members, the association co-operates with, and assists, the appropriate ministries of government and municipal bodies in all matters pertaining to insurance and related services*