



Promote

The Outstanding CSR of the Year[®] Award

Entry Deadline: May 1st



THE NATIONAL ALLIANCE
for Insurance Education & Research

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This packet is meant to help you promote, track, and navigate the Outstanding CSR of the Year competition. Please refer to this packet for answers to any questions you may have or contact: Jennifer Pearson at jpearson@scic.com.

About the Outstanding CSR of the Year Award

History

The OCSR competition started in 1991 to honor customer service representatives and account managers who have made significant contributions to the insurance and risk management industry. The competition is sponsored by the Society of Certified Insurance Service Representatives (CISR) and the Society of Certified Insurance Counselors (CIC)-- proud member organizations of The National Alliance for Insurance Education & Research.

Guidelines

Use the following talking points in your print and digital communications. They can also be incorporated into conversations, speeches, letters, and press releases.

What's the deadline?

The competition deadline is **May 1st**. Nominees must submit a completed entry form along with an essay and letter(s) of recommendation to their licensed state association.

Who can nominate?

Anyone can make a nomination. You can even nominate yourself! Simply fill out and submit the Nomination Form. Once you have nominated someone, encourage them to write their essay and submit their entry.

Who can enter?

Anyone, regardless of affiliation or professional designation, whose primary duties center on insurance customer service, is eligible to enter. A CIC or CISR designation is not required. However, we recommend that candidates have a minimum of two years of industry experience and enough experience to share through their essays.

Eligible Candidates must:

- Be insurance customer service representatives, account managers, or have primary responsibility for customer service duties
- Submit a completed Entry Form that includes references, education/contribution/achievement information
- Submit letters of recommendation from business/professional references.
- Write a 500 to 1000-word essay on the following topic:

Transferable Skills are learned from experience which includes prior careers, education, volunteer work, or personal encounters. What are the top three skills you transferred from outside the insurance industry to your current job role? Discuss how you leverage your skills, continue to develop and evolve them, and how you transfer your expertise to others to ensure perpetually exceptional customer service.

Award Information

Nominees compete at state level to become one of five finalists.

Individuals who nominate the national winner receive a \$1000 cash award.

State Winners	Finalists	National Award Winner
National Recognition	\$500 Cash Award	\$2000 Cash Award
Advancement to National Competition	National Recognition	National Recognition
Framed Certificate	Gold and Garnet Pin	Gold and Diamond Pin

NEW 2022 National Qualifier Stage:

State Winners will be required to submit a short video entry for the National Competition. Video guidelines will be sent to State Winners when selected.

Frequently Asked Questions

What should I do once I receive a nomination?

Once you receive a nomination, you must alert the nominee with a “Congratulations” email and send them your state specific Entry Form. The Entry Form outlines several items the nominee will need time to gather and submit. You must also send a “Thank you” email to each nominator.

The National Alliance recommends that you create a tracking sheet for all nominations you receive. Using a tracking sheet helps ensure that you send a “Congratulations” email and Entry Form to each nominee and a “Thank You” email to each nominator. Please send these emails as soon as you receive nominations.

Note: Please respect the wishes of any nominators that want to remain anonymous.

Do you need a designation to compete?

Designations are not required in order to compete. Any individual with primary duties involving insurance customer service is eligible to compete regardless of job title, affiliation, or professional designation.

Can someone nominate anonymously?

Anonymous nominations are accepted. A nominator’s name will not be shared unless they give permission to do so.

What do I do if a candidate asks who nominated them?

DO NOT give out a nominator’s name if they have asked to remain anonymous. Please say, *“Your nominator has asked to remain anonymous. I can’t provide you with that information.”*

How long does the essay need to be?

500 to 1000 words.

Frequently Asked Questions Continued...

When are the state winners announced?

In mid-July, The National Alliance will prepare a news release announcing all the state winners and will distribute it to our Board Members, Licensee associations, and national media outlets. You may contact your state winner to congratulate them **after** the announcement is made by The National Alliance. An award certificate will be mailed to all state winners.

When is the national winner announced?

A news release announcing the national winner will be distributed by The National Alliance in late August or September.

Judging Guidelines

Who should be on the judging committee?

- Association Board and Employees
- Education Committee
- Previous State Winners

How should we judge the submissions?

The National Alliance follows these steps to determine the national winner. Although it is not mandatory, we feel that it is in the best interest of your state competition if the same process is followed at the state level.

Judging Steps

Step 1: Determine candidate eligibility.

Candidates must meet the following minimum requirements in order to enter the competition:

1. Be an insurance customer service representative, account manager, or have primary responsibilities for insurance customer service.
2. Provide a written essay on this year's theme.
3. Submit a completed Entry Form, letters of recommendation, and essay. These materials must be emailed or postmarked by **May 1st**.

Step 2: Create candidate judging packets and begin ranking.

1. Assemble packets with the candidate's Nomination form, Entry form, letters of recommendation, essay, and judging sheet.
2. Give packets to your judging committee.

Step 3: Read candidate essays.

The highest possible score a candidate can receive on the essay portion is 20.

The Outstanding CSR of the Year competition is primarily judged on a written essay response to the year's theme. Essays count for 2/3 of the candidate's overall score and must respond to the theme and address the candidate's contributions to company and community, competence, and subject matter expertise.

Judges should rank candidates on a scale of 1 to 5 based on the criteria outlined below.

1. **Originality of Ideas**
 - Contributes fresh, enthusiastic response to topic
 - Displays thoughtful insight
2. **Practicality of Ideas**
 - Shows subject matter expertise

Judging Guidelines

Continued...

3. **Quality of Writing**
 - Maintains focus on the topic
 - Communicates thoughts clearly
4. **Creativity**
 - Grabs readers attention immediately
 - Creates clear visual images

Step 4: Review Candidate Entry Forms.

The highest possible score a candidate can receive on the entry form portion is 20. From the Entry Form, Judges should rank candidates on a scale of 1 to 5 based on the criteria outlined below:

- Agency/Company/Colleague contributions
- Insurance-related affiliations
- Community Involvement
- Educational achievements

Step 5: Tally scores.

The highest possible total score a candidate can receive is 40 (20 for the essay and 20 for the entry form).

Add the scores in step 3 and step 4 for each of your candidates and track the information on the judging tally sheet.

The candidate with the highest score is your winner. If other candidates have the same score, rely on the quality of their essays to determine a winner.

Notifying Your State Winner

I've selected my state winner. What do I do now?

Once The National Alliance has announced the state winners via a press release, please send an email to candidates that did not win and encourage them to participate next year.

****PLEASE DO NOT alert your state winner until AFTER The National Alliance has distributed the press release in June.****

Submit the winning candidate's packet (Nomination Form, Entry Form, letters of recommendation, and essay) to your Relationship Management Coordinators at The National Alliance by **May 15**.

Promotional Ideas

Promote the competition on your website, social media, and email marketing

Promote the competition in your brochures and other printed materials.

Contact past state entrants and winners

Contact companies and local interest groups

Contact VIPs

**Engage your association executive and/or Board President.
Ask them to do one or all of the following:**

- Speak about the award at programs, meetings, and agency/company visits
- Write an article about the award (i.e. letter from the president, testimonial)
- Encourage other Board Members to make nominations

