



COMMUNITY
BROKER
NETWORK

CBN 2019 Highlights

At Community Broker Network, our purpose is to empower; our Authorised Brokers to support your Clients in making informed choices that achieves the best outcomes.

As we wrap up this year, we look back and celebrate the successes of 2019 in our CBN 2019 Highlights report.

Brand

On the Brand front at CBN, we have had some big changes – specifically, our new logo but also:

- Our company name changed from National Adviser Services Pty Ltd to Community Broker Network Pty Ltd.
- Our logo and brand identity were refreshed and updated.
- We launched our new website – www.cbnet.com.au which now includes areas for “Find a Broker” search tool and Brokers in Action to showcase the great work you do. If you would like to share your stories with us, please share the details [here](#).

Event Highlights

In 2019, the Brand team also ran many events including:

- **6** Professional Development days with a total of **545** attendees.
- **1** Conference with **310** attendees.



- **5** End of Year functions with **200** attendees.
- **1** Vic Golf Day with **45** attendees.
- **1** WA Office Opening with **45** attendees.
- **15** webinars with **1455** attendees.

We look forward to 2020, where we will be hosting a new suite of events, especially our Conference in Alice Springs taking place in August 2020.

Operations

Our Operations team have been busy this year, ensuring that we provide the right support and platform assistance to improve the functionality for our broker businesses.

Trust Accounting Highlights

We have developed the new DEFT payment facility for Brokers using INSIGHT. This has allowed for payments to be made via the new system. These payments are automatically receipted against Brokers client's policy the next business day meaning that payments are made in a timely manner and improve the turnaround times on completing policy purchases.

Risk and Compliance Highlights

The D.O.C.K

We have launched The D.O.C.K. this year. The D.O.C.K. is an automated work platform that features:

- Automated forms with in-built work flow so you can track the current status of a routine procedure/process.
- When a form is submitted, a register is created specifically for your business and is easily downloaded so you have a central record at a click of a button.
- For Principals, this provides full visibility of your business and the activities that affect your business.
- Replaces the Quarterly Declarations (via Survey Monkey).



Marketing Audits

We have been busy initiating the process of auditing all AB websites to ensure compliance, with a focus on:

- Correct FSG version, privacy statement, complaints policy and code of practice.
- Disclosure of AR status.
- ASIC restricted words (Independent, unbiased & impartial).
- General overview – misleading and deceptive wording.

IT Highlights

10,939 tickets resolved.

90% satisfaction rate.

The Operations Team are excited to continue their work in supporting you as a business and are excited to be launching new tools and platforms to help you grow, thrive and prosper.

Broker & Partnering

Our Broker & Partnering team have been busy all year, ensuring that all our brokers have access to support and tools to help them achieve. Have a read down below with what our Broker & Partnering Team have achieved in 2019.

Network Advisor Team Highlights (April-December)

- **11,788** calls received.
- **11,325** completed queries.
- **2,281** system issues resolved.
- **2,862** completed training.



Placements Highlights

- CBN hosted their first B2C webinar on Cyber Insurance.
- Developed CBN's first technical Podcast.
- Facilitated **5** visits to Lloyds of London.
- Launched **~7** New Insurer Markets.
- We kept brokers informed on market conditions.
- Processed **\$6.9m** of Home Warranty Business.

Broker & Partnering Highlights

- Managed on an ongoing basis **40** Brokerages (including CBN owned).
- Holiday assistance provided to an additional **58** brokerages.
- Emergency assistance provided to an additional **15** brokerages.
- Processed **4,200** renewals.
- Assisted in processing **480** endorsements.
- Assisted in processing **250** new business policies.
- Assisted in collecting Debtors for **600** policies.
- Assisted in obtaining **320** quotations for our Brokers.
- Assisted in providing **260** Certificates of Currency.
- Assisted in **250** claims.
- Assisting GWP of **\$48,000,000**.

We are looking forward to the new year where we will be assisting with developing new marketing material and approaches for our services, expanding on a claims offering to brokers and growing our assistance models to the network.



Distribution

What a fantastic year it has been in 2019 for our Distribution team.

- A brand-new distribution team was introduced with our State Managers, Michael Wennerbom (QLD), Chris Macpherson (NSW/ACT), Jonathan Lam (Vic/Tas) & Nicky Dunkin (SA/NT/WA) providing broker assistance calls, emails & visits, to help you achieve business success.
- Issued 4 best practice guides to improve current broker procedures.
- Engaged with our network through a variety of activities, including lunch n learns, PD Day's, end of year functions and our annual conference. Please stay tuned for more opportunities to connect and collaborate in the new year
- Continued to strengthen Alliance Partners, through various networking and CBN events.

As we look to 2020, The Distribution team is looking to build on these foundations and reach to more of our brokers more often and ensure our brokers have what they need to keep their mutual customers and our community prospering!

Strategic Partners & Investments

Our Strategic Partners and Investments team have been busy this year, ensuring that our brokers have access to the best insurer markets and products. The team have also:

- Introduced Broker HealthCheck (BHC) across CBN.
- Assisted AB's develop action plans and business plans using BHC reports.
- Developed and released BHC Whitepaper, which analysed aggregated data from AB's and drove CBN initiatives.
- Introduced Community Partner Strategic Growth initiatives.



We are looking forward to 2020 where the team hope to increase utilisation of Steadfast Client Trading Platform by CBN AB's, bring more insurers and more auto rated products on SCTP and introduce BHC and Business planning for all investment enterprises.