

# About the Outstanding CSR of the Year Award

## History

The OCSRY 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 Risk & Insurance Education Alliance.

## 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. **Individual who nominates the National Winner will receive a \$1000 cash award.**

## 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:

### **"Balancing Technology and Human Connection: The Modern CSR's Role in Customer Service"**

*As technology continues to reshape the insurance industry, CSRs and Account Managers must navigate the challenge of integrating digital tools while maintaining strong, personal client relationships. AI, automation, and data analytics have enhanced efficiency and accuracy, but over-reliance on technology can lead to impersonal interactions.*

*In your essay, discuss three keyways' CSRs can successfully embrace technological advancements while preserving meaningful client relationships.*

State Winners	Finalists	National Award Winner
National Recognition	\$500 Cash Award	\$2000 Cash Award
Framed Certificate	National Recognition	National Recognition
Eligible to Compete in the National Competition*	Gold and Garnet Pin	Gold and Diamond Pin

### **\*National Qualifier Stage:**

If selected as a State Winner, a short video entry will be required for consideration 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.

Risk & Insurance Education 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 July, Risk & Insurance Education 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 Risk & Insurance Education 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 Risk & Insurance Education Alliance in late October or November.