

## Mission Statement

THE RELENTLESS PURSUIT OF EXCELLENCE THROUGH SIMPLICITY

## Vision Statement

To be the leading specialty commercial insurance brokerage in Canada,  
a progressive workplace for those seeking knowledge and growth,  
and a responsible broker partner for our clients.

We are PLATFORM for everyone.

## INTEGRITY

TO GIVE REAL CUSTOMER SERVICE, YOU MUST ADD SOMETHING WHICH CANNOT BE  
BOUGHT OR MEASURED WITH MONEY, AND THAT IS SINCERITY AND INTEGRITY.

It is essential we operate in a circle of openness and honesty, and this extends to both personal and professional levels. We retain our integrity and we must not be afraid to tell the truth nor tolerate others who violate it;

We are responsible and take ownership of outcomes especially when they go wrong;

We are accountable first by being accountable to ourselves. We are clear with the expectations we have of each other, and we are aware of what is happening in the organization. We strive to be able to deal with issues as they arise;

We are reliable and we keep the promises we make. We strive to do whatever it takes to meet deadlines and exceed expectations;

We are professional and go out of our way to remain professional. Taking the high road takes more effort and discipline, but it builds respect and trust for the long term;

We strive to gain the trust of all stakeholders.



## **HUMILITY**

HAVING OR SHOWING A MODEST ESTIMATE OF ONE'S OWN IMPORTANCE  
IN EXCHANGE FOR THE IMPORTANCE OF THE TEAM.

We are respectful of our clients, colleagues, insurance markets, regulators and our competition;

We do everything possible to avoid mentioning our competition by name as it strengthens their credibility and takes away from our precious air time with clients and prospects;

We are humbled by our success built by our richly diverse team;

We are not boastful about our successes, there are other tactful ways to deliver a positive message and impressions about PLATFORM;

We never take anyone nor their business for granted;

We actively demonstrate to our clients that we put them first and act within their best interests;

We are genuine! Both as team and as a teammate. Our clients will see that and gravitate toward us.

## **DRIVE**

RELENTLESSLY COMPELLED BY THE NEED TO ACCOMPLISH A GOAL;  
VERY HARD-WORKING AND AMBITIOUS.

We are always the hardest working team;

We are proactive (clients never have to follow up with us);

Diversity of thoughts, viewpoints and opinions drive us to success;

We commit to everything we say and we execute promptly on our customers' instructions;

We push the ball forward and provide clients with regular, timely updates and information that lets them make the best decisions for their organizations;

We take pride in our work;

We search for continuous improvement daily – without it we know we'll lose business.

## **SIMPLICITY**

EASILY UNDERSTOOD OR DONE; PRESENTING NO DIFFICULTY.

UNCOMPLICATED IN FORM, NATURE, OR DESIGN.

We provide a client experience geared toward “ease of doing business”;

We understand and appreciate that many of our clients don’t like insurance, but understand and value the importance of it;

We strive to be inclusive of all opinions while prioritizing what is best for our clients in the name of simplicity;

We make it our business to understand our clients’ business;

We communicate in a concise, clear and straightforward fashion. We avoid confusion and redundant information that isn’t critical to our client (unless they ask);

Simple is smart. Operating in a concise, clear manner increases the value of one’s individual currency.

It takes more skill and time to operate in a simple manner, however it gets easier with practice and pays off in the long run.

## **SMART**

HAVING OR SHOWING A QUICK-WITTED INTELLIGENCE.

WE DO OUR HOMEWORK and we are prepared! We invest in ourselves and master our knowledge. We strive to keep learning about our industry and our clients’ business to the degree we can comfortably engage on a high level about the challenges they face and how we can provide risk and insurance solutions for them;

We understand the importance of prioritizing tasks and the effort level required to complete them properly the first time;

Differences of opinions challenge us and ultimately makes us wiser;

We take confidentiality seriously. Discretion is paramount, being indiscreet is fatal;

We strive to be intuitive and cognisant of our own Emotional Intelligence (EQ). Each client and colleague is unique and requires their own individual advice and solutions;

We demonstrate foresight, think ahead and plan for our clients’ upcoming needs (renewals, questions, claims and projects);

We actively demonstrate/prove to insurers that we understand more about our clients and their risks than do our competition. We submit complete, meticulously accurate submissions and presentations.