

**Insurance Brokers Association of New Zealand  
Business Plan 2026 - 2028**



## Introduction

Welcome to the Insurance Broker Association of New Zealand (IBANZ) Business Plan 2026-2028.

The IBANZ Business Plan was crafted with the IBANZ Board, Corporate Members and involved significant consultation across our wider membership and the IBANZ Team.

The future of IBANZ will be a purpose-led organisation, focusing on promoting our industry, the value of brokers, and attracting talent to our industry. The Business Plan establishes a clear purpose statement and goals to create a consistent approach across advocacy, industry leadership, member services and communications.

The organisation will be transitioning from an inward-focused model to a far more collaborative approach, fostering stronger connections and shared goals. This shift is supported by the IBANZ Business Plan, which establishes a solid foundation and lays the groundwork for an organisation prepared to adapt to the challenges of a rapidly evolving industry.

Through consultation with our members, we have created four goals: Influential Industry Leadership & Advocacy, Professional Member Services, Effective Communications and a Resilient and Future Focused Organisation.

To achieve these goals, 15 priorities have been identified over the 2026 – 2028 years. Some of these priorities are underway, and some a newly identified. These priorities have been ordered to ensure that the organisation will have the capacity and capability to deliver.

Our industry plays a critical role in providing high-quality insurance advice and protecting New Zealand's financial future. Our leadership is required to ensure we better educate our members and the wider public about brokers, provide research and thought leadership for the future of broking, and articulate our stories of success.

We extend our heartfelt thanks to everyone who played a role in shaping this Business Plan. Membership organisations thrive because of their people, and your commitment and enthusiasm for IBANZ future ensures we are ready to seize the opportunities ahead.



**Katherine Wilson**  
Chief Executive



**Neil Cousins**  
President

## IBANZ Purpose Statement

**“Empowering New Zealand towards a resilient financial future through high-quality insurance advice.”**



**“Empowering”** puts the focus on the people our members are helping. It’s active and purposeful.

**“New Zealand”** collective and greater good approach as centres New Zealand individuals and businesses as the ultimate client.




**“towards a resilient financial future”** broadens the idea of resilience beyond natural hazards, disaster, or risk. It captures long-term financial security.

**Empowering New Zealand towards a resilient financial future through high-quality insurance advice**

**“through high-quality insurance advice”** reflects our Continuing Professional Development, professional body status, and trust that members pride themselves on.

## Values

Organisational values are set internally. They reflect what team members believe is important to them in a work setting. These values drive our motivation, inspire our work, and are what get us out of bed each morning. In November 2025, a workshop was held to explore and identify the values that matter most to IBANZ team. The following values were identified:

		
<p><b>Leading with authenticity</b></p> <p>We lead with authenticity, achieve with purpose, and act with integrity and accountability.</p>	<p><b>Solution-Driven Thinking</b></p> <p>We turn obstacles into opportunities, tackling complexity with a solution-driven focus.</p>	<p><b>One team</b></p> <p>We grow through trust, teamwork, and positivity, driven by collaboration and communication.</p>

## Goals



The four goals have been established from extensive consultation with IBANZ members and the wider team. The four goals will be the aspirational focus for IBANZ 2.0. Strategic priorities will sit under each of the four goals and are the stepping stones on how we can achieve our goals.

The four goals for IBANZ 2.0 are:

	<p><b>1. Influential Industry Leadership &amp; Advocacy:</b> We champion insurance brokers and influence government to support policies that enable a thriving insurance industry.</p>
	<p><b>2. Professional Member Services:</b> We create an industry standard, provide Continued Professional Development, and build strong relationships for our members to elevate professionalism and integrity.</p>
	<p><b>3. Effective Communications:</b> We promote the vital role insurance brokers play in creating a resilient financial future for New Zealand and the wider economy.</p>
	<p><b>4. A proactive organisation:</b> We equip the organisation with the skills and resources needed to consistently provide exceptional value to our members.</p>

## Priorities

Strategic priorities are the stepping stones on how we can achieve our four goals. 15 Priorities have been identified over the under each of the four goals.

<b>Influential Industry Leadership &amp; Advocacy:</b> We champion insurance brokers and influence government to support policies that enable a thriving insurance industry.	
	<b>Lead and collaborate across the insurance industry for shared outcomes.</b> <ul style="list-style-type: none"> <li>• Monitor key stakeholder engagement.</li> <li>• Establish key stakeholder relationships within the insurance industry and identify projects we can align on.</li> </ul>
	<b>Refine our advocacy</b> <ul style="list-style-type: none"> <li>• Develop advocacy priorities and member positioning.</li> <li>• Develop and implement proactive stakeholder engagement plans for central government politicians and officials.</li> </ul>
<b>2027+</b>	
	<b>Attract talent to the industry</b> <ul style="list-style-type: none"> <li>• Undertake industry research (e.g. positive client stories, NZ stats).</li> <li>• Establish an IBANZ Talent Attraction Advisory Group to develop a forward work program.</li> </ul>
	<b>Support diversity and inclusion</b> <ul style="list-style-type: none"> <li>• Monitor and report on IBANZ diversity and inclusion.</li> </ul>

### We will measure success by:

- ✓ Number of key stakeholder meetings.
- ✓ Establishing clear advocacy priorities and a solution focused advocacy strategy.
- ✓ IBANZ is recognised as the voice for the insurance broking industry.
- ✓ IBANZ is a trusted advisor with central government and Ministries.
- ✓ IBANZ is connecting insurers and forming trusted partnerships.
- ✓ Greater representation of women at IBANZ webinars, events, in Governance and engagement with IBANZ.
- ✓ Attraction of talent to our industry.




**Professional Member Services:** We create an industry standard, provide Continued Professional Development, and build strong relationships for our members to elevate professionalism and integrity.

	<p><b>Stronger member engagement</b></p> <ul style="list-style-type: none"> <li>• Develop and implement a member strategy that identifies, converts and retains members.</li> <li>• Establish IBANZ Regional Committees and Advisory Groups to increase member engagement and harness member expertise across advocacy topics, webinars, events, and special interest projects.</li> <li>• Develop and deliver a events and webinar strategy and program.</li> </ul>
	<p><b>Improve and streamline the webinar process</b></p> <ul style="list-style-type: none"> <li>• Create an automatic invite and improve invoicing system for webinar and future event registrations.</li> <li>• Strengthen webinar security by upgrading to Teams Premium.</li> <li>• Develop an IBANZ Presenter Guide.</li> </ul>
<p><b>2027+</b></p>	
	<p><b>Deliver a wider range of member benefits</b></p> <ul style="list-style-type: none"> <li>• Investigate regional events (outside of Auckland), deliver (if applicable).</li> <li>• Investigate biennial conference, deliver (if applicable).</li> <li>• Investigate a mentor/mentee program.</li> </ul>

**We will measure success by:**

- ✓ A clear membership strategy that monitors membership numbers, retains members and identified areas for expansion.
- ✓ Expand membership data collection to age, years in industry, experience, role, etc.
- ✓ Increased engagement with our members through regional committees/groups.
- ✓ A strong webinar program.
- ✓ The development of an event strategy that results in increased engagement with members.
- ✓ A mentor/mentee program.






**Effective Communications:** We promote the vital role insurance brokers play in establishing a resilient financial future for New Zealand and the wider economy.

	<p><b>Tell our story</b></p> <ul style="list-style-type: none"> <li>• Develop and implement an internal and external communication plans.</li> <li>• Reporting and monitoring (e.g. member surveys, newsletter open rates, click rates, social media reach and engagement).</li> <li>• Undertake sector research.</li> </ul>
<p><b>2027+</b></p>	
	<p><b>Active media campaign</b></p> <ul style="list-style-type: none"> <li>• Leverage off the ‘tell our story’ and ‘talent attraction’ workstreams to increase public awareness of brokers.</li> </ul>
	<p><b>Review CoverNote</b></p> <ul style="list-style-type: none"> <li>• Undertake a review of CoverNote following implementation of revised communication plans.</li> </ul>

**We will measure success by:**

- ✓ Establishing and delivering internal and external communication plans.
- ✓ Positive member feedback on IBANZ improved communications.
- ✓ Improving IBANZ newsletter open rates, click rates, social media reach and overall online engagement.
- ✓ Producing sector research that can support our external communications plan.
- ✓ Increase public awareness of IBANZ and insurance brokers role.








**A proactive organisation:** We equip the organisation with the skills and resources needed to consistently provide exceptional value to our members.

	<p><b>Accountability and performance measures</b></p> <ul style="list-style-type: none"> <li>• Adopt the new Business Plan and supportive business plans.</li> <li>• Establish monthly reporting.</li> <li>• Establish 1:1 monthly team meetings.</li> </ul>
	<p><b>A unified IBANZ system</b></p> <ul style="list-style-type: none"> <li>• Establish clear filing system in SharePoint that aligns with the Business Plan.</li> <li>• Review and document all existing organisational processes and procedures.</li> </ul>
	<p><b>Streamline financial reporting</b></p> <ul style="list-style-type: none"> <li>• Review financial reporting principles and implement new management reporting.</li> <li>• Update IBANZ Constitution to align with financial reporting principles.</li> </ul>
<p><b>2027+</b></p>	
	<p><b>Improve software and systems</b></p> <ul style="list-style-type: none"> <li>• Access and review membership software and systems.</li> <li>• Deliver improvements that are identified.</li> </ul>
	<p><b>Governance</b></p> <ul style="list-style-type: none"> <li>• Update IBANZ Constitution (2026) to incorporate regional governance that can be rolled out in 2027.</li> </ul>

**We will measure success by:**

- ✓ Business Plan (and supportive project plans) developed and implemented.
- ✓ Monthly reporting established.
- ✓ Monthly team meetings to track and measure progress.
- ✓ All files are backed up on SharePoint.
- ✓ A clear filing system that aligns with our business plan for futureproofing of IBANZ.
- ✓ Updated financial reporting principles and Constitution.
- ✓ Ensuring we have a user-friendly system for our members and IBANZ team.

## Business Plan on a Page

<b>Purpose</b>	<b>Empowering New Zealand towards a resilient financial future through high-quality insurance advice</b>			
<b>Values</b>	 <b>Leading with authenticity</b> We lead with authenticity, achieve with purpose, and act with integrity and accountability.	 <b>Solution-Driven Thinking</b> We turn obstacles into opportunities, tackling complexity with a solution-driven focus.	 <b>One team</b> We grow through trust, teamwork, and positivity, driven by collaboration and communication.	
<b>Goals</b>	 <b>Influential Industry Leadership &amp; Advocacy</b> We champion insurance brokers and influence government to support policies that enable a thriving insurance industry.	 <b>Professional Member Services</b> We create an industry standard, provide Continued Professional Development, and build strong relationships for our members to elevate professionalism and integrity.	 <b>Effective communications</b> We promote the vital role insurance brokers play in creating a resilient financial future for New Zealanders and the wider economy.	 <b>A resilient and future focused organisation</b> We equip the organisation with the skills and resources needed to consistently provide exceptional value to our members.
<b>2026 Priorities</b>	<ol style="list-style-type: none"> <li>Lead and collaborate across the insurance industry for shared outcomes.</li> <li>Redefine our advocacy.</li> </ol>	<ol style="list-style-type: none"> <li>Stronger member engagement.</li> <li>Improve and streamline the webinar process.</li> </ol>	<ol style="list-style-type: none"> <li>Tell our story</li> </ol>	<ol style="list-style-type: none"> <li>Accountability and performance measures.</li> <li>A unified IBANZ system.</li> <li>Streamline financial reporting.</li> </ol>
<b>2027+ Priorities</b>	<ol style="list-style-type: none"> <li>Attract talent to the industry.</li> <li>Support diversity and inclusion.</li> </ol>	<ol style="list-style-type: none"> <li>Deliver a wider range of member benefits.</li> </ol>	<ol style="list-style-type: none"> <li>Active media campaign.</li> <li>Review CoverNote.</li> </ol>	<ol style="list-style-type: none"> <li>Improve software and systems.</li> <li>Governance</li> </ol>

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