

**INVEST 2026/2027 REAL WORLD READY INSURANCE CHALLENGE
PRESENTATION EVALUATION FORM**

Did the participating team...		Novice	Developing	Proficient	Exemplary	Judged Score
BUSINESS PLAN						
1.	Clearly present the agency's mission, vision, insurance focus, and target market.	0	3	7	10	
2.	Explain how the agency will build a workplace culture that attracts, develops, and retains young talent.	0	3	7	10	
3.	Identify the key insurance / business professionals to be hired and clearly explain the responsibilities of each role.	0	3	7	10	
4.	Present a convincing business case demonstrating how the hiring strategy and leadership team position the agency for long-term growth and why investors should fund the agency.	0	3	7	10	
B O N U S	<i>Interview an insurance professional and incorporate at least one meaningful insight or recommendation into your business plan. Be sure to include the insurance professional's name, job title and company.</i>	0			5	
	<i>Total Points in this Section including BONUS</i>				45	

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VIDEO PRESENTATION						
6.	Describe how the agency's marketing strategy will attract Gen Z talent, promote insurance careers, attract Gen Z customers, and contribute to the agency's long-term success.	0	3	7	10	
7.	Clearly communicate the agency's mission, vision, insurance focus, target market, and hiring strategy while effectively summarizing the business plan.	0	5	10	15	
8.	Deliver a professional presentation that is creative, well-organized, uses effective visuals, demonstrates strong communication skills, and stays within time limit.	0	5	10	15	
5.	Present a compelling and persuasive investment pitch that demonstrates how the agency's hiring strategy positions the agency for long-term success and why investors should fund the agency.	0	5	15	20	
B O N U S	<i>Feature the insurance professional you interviewed by including a video clip or photo of them in your video. Incorporate at least one meaningful insight or recommendation from the interview and explain how it influenced your agency's business plan, hiring strategy or overall vision.</i>	0	N/A	N/A	5	
<i>Total Points in this Section including BONUS</i>					65	
Total Overall Points					110	