



NATIONAL SALES FORCE

SMALL TEAM SHORT DEADLINES




CLIENT DESCRIPTION

A corporate insurance agency. Provides opportunities to individuals, families, seniors, and small businesses to purchase Health, Medicare, Life and Supplemental insurance. They partner with over 200 companies and offer thousands of policies. This company has over 3,500 agents and employees with over 200 offices in all 50 states including Washington D.C.

CHALLENGE

When we met our client, they:

- Were spending more than **\$750,000** in training per year
 - Had a **small 3 person training team** tasked with delivering a **large amount of content** (25 courses in 3 months) on short deadlines
 - Lacked a **central message** for training all agents across the country
 - Risked **potential legal issues** by not knowing what was actually being trained and to whom
 - Had first year agent retention **rate of only 30%** due to poor delivery of training standards
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GOALS

The client's goals were to:

- Reduce the amount of money spent on training, while providing higher quality courses with central messaging across all offices and agents
- Use their newly purchased Learning Management System to create an online onboarding program that would be fun yet informative
- Provide all agents with the information they needed to be successful

SOLUTION

Intelligence by Design (IBD) partnered with this company to:

- Develop a strategic plan to help them meet their goals
- Reduce the course development costs by developing a process which allowed the client to complete the template, script writing and audio recordings in house
- Take client deliverables and incorporate them into the design and development of several 15 minute elearning courses
- Strategically develop short courses to give the agents short bursts of knowledge, on demand according to their busy workloads

RESULTS

IBD was able to:

- Significantly reduce the amount being spent on initial agent training by 80% (from \$750,000 down to \$150,000)
- Develop 25 courses in about three months
- Deliver SCORM-compliant courses, created in Articulate Storyline, ready to be uploaded into the LMS for tracking and documenting who has taken each course and when
- Increase retention rate to more than 50%
- Provide a projected increase of ROI by 50% each year post implementation