



Accelerating Sales New Hire Performance at Unum

Objective: Shorten the time to productivity for new salespersons.

Background: Unum is a specialty insurance company that protects over 25 million people worldwide. It is a leading provider of disability, group life, long term care, and voluntary benefits in the United States.

Unum sells its insurance products through brokers. To ensure quality and effectiveness, all new U.S. salespeople must complete the Unum University Sales New Hire Training Program, a combination of self-guided eLearning in the local field office and formal classroom training at the headquarters.

The Program: The Unum University Sales New Hire Training Program includes four distinct phases:

1. Sales New Hire (SNH) 101: twelve weeks of intensive self-study with coaching and mentoring support from the market manager and mentor in the field office;
2. Sales School I: two weeks of instructor-led classroom training on fundamental sales skills and demonstration of insurance product knowledge;
3. SNH 102: Eight weeks of on-the-job application with continued market manager and mentor support, and additional self-guided learning;
4. Sales School II: One week—prior to territory assignment—practical application of skills and knowledge through classroom-facilitated team challenge assignments, and mock broker/customer role-plays.

New hires receive their territory assignment when they have successfully completed all four phases of the program.

The Challenge: As with most new hire training programs, Unum's Sales Training team had two key challenges:

1. Making sure that new hires were adequately prepared to get the maximum value from classroom training.

2. Driving learning transfer—ensuring that new sales people applied what they learned to ramp up performance quickly.

Unum's widely dispersed structure compounded these challenges. Although the expectations for preparation were clear, new salespeople would often arrive for the first classroom session without having successfully finished their assignments. Their incomplete preparation sub-optimized the experience for them and for others in the class.

Similarly, execution of phase 3—on-the-job application post-training—varied widely. With new hires spread around the country, it was very hard for the Unum University training team to monitor individual progress or the quality of the coaching they received from local managers.

The Solution: What was needed was an efficient system that would allow the training team to monitor the entire process to ensure that:

- new hires stayed on track with their preparatory work;
- were accountable for transferring what they learned from the classroom sessions;
- and that local managers consistently coached and supported progress.

ResultsEngine®: *ResultsEngine* is a web-based learning transfer support tool developed by the Fort Hill Company to facilitate learning transfer and, as a result, increase the return on training investment.

In this application, Fort Hill worked closely with the Unum Sales Training team to adapt the tool to support all four phases of learning and development—from preparation to on-the-job application.

During the 12 weeks of self-guided learning in SNH 101, new hires report their progress against predefined milestones in *ResultsEngine*. This allows the Unum Sales Training team to monitor new hires, even though they are dispersed throughout the country. They can alert the local manager if a trainee is falling behind, ensuring a greater and more uniform level of preparation for the classroom session.

To accelerate learning transfer from the instructor-led training, participants set goals for on-the-job application and track their achievement, as well as the completion of additional blended learning assignments, in *ResultsEngine* between classroom sessions 1 and 2. Participants set and track additional goals after the second classroom session. The training and learning transfer period spans a full six months.

ResultsEngine provides training managers with a clear view into progress on goals, coaching from local managers, and the results achieved throughout the entire process.

The Results: Managing the Sales New Hire learning experience as a fully integrated process, and implementing learning transfer support with *ResultsEngine*, has allowed The Unum University Sales Training Team to accomplish three key objectives:

1. Greater Training Effectiveness

The effectiveness of the training program has improved since the implementation of the learning support system and active monitoring of the self-study periods. First, a much higher percent of the new hires arrive at Sales School I well-prepared and motivated. As a result, the training team can deliver more challenging and comprehensive content.

Second, a higher percentage of new hires complete the six-month program successfully because the team can monitor and coach them before they ever travel to headquarters. A higher success rate translates into more efficient use of training resources overall.

2. Better Sales Performance

Since the introduction of the new approach, sales performance of new hires during their first six months in their own territory has improved. Earlier and better sales performance translates into accelerated top line growth and greater profitability.

3. Greater Return on Investment

The implementation of *ResultsEngine* has accelerated territory management readiness and sales results during the first two years on the job.

Summary: The Unum Sales Training Team has generated real value for Unum in terms of greater training effectiveness, improved sales performance, and higher return on investment by conceiving and managing new hire training as a fully integrated, end-to-end process.

ResultsEngine was vital in achieving these results by providing the Training Team with the ability to effectively and efficiently manage and monitor a large number of geographically dispersed learners and sales coaches.

