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Metrics & Measurement: Evolving Your Strategy

“To earn a place at the table, a voice in strategic discussions, and the resources needed to achieve its mission, the learning function must consistently deliver credible evidence of its impact.”

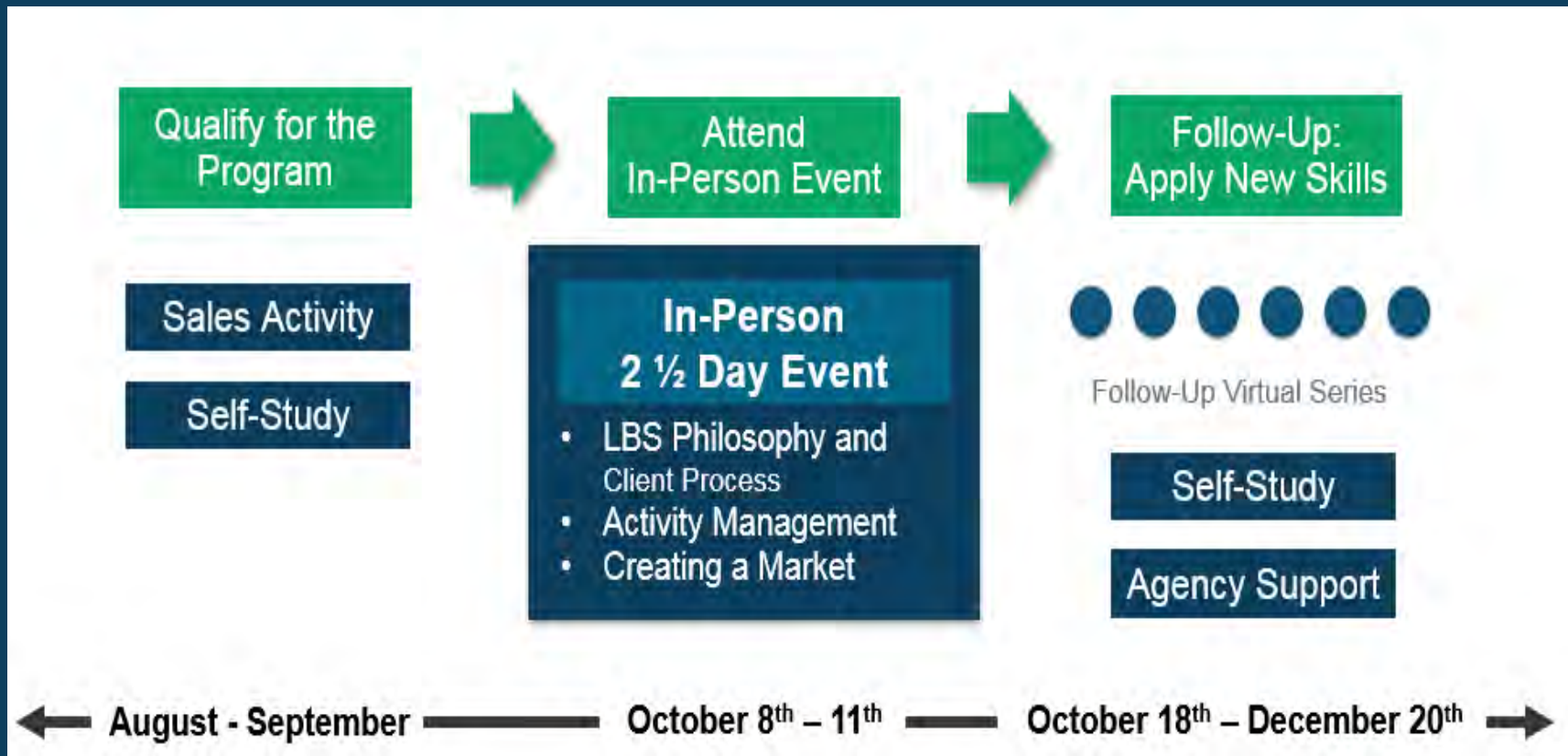
The Six Disciplines of Breakthrough Learning:
How to Turn Training & Development into BUSINESS RESULTS
Roy VH Pollock, Andrew McK. Jefferson, Calhoun W. Wick

Lessons Learned from the Frontline

1. Focus on key performance
2. Build a strong business case
3. Interpret the data
4. Get over your fear of numbers

Foundations: Our Onboarding Program

More than an event, it's a 90-day learning experience



Focus on Key Performance

Rapid design process



Bring all stakeholders together for half a day

Define Goal

What does “Great” look like?

- Metrics
- What should trainees be able to DO after training?

Assess Current State

Current training:

- Strengths
- Opportunities for improvement
- Gap analysis

Define Future State

How do we get to Great?

- Training
- Coaching
- Job support
- Other

Outcome = Agreement on Priorities for Learning

Focus on Key Performance

Measurement and accountability

Measurable Outcomes

- Set appointments
- Conduct an initial “Philosophy” meeting
- Gather client data
- Complete Term Life and Disability Insurance sales
- Gather referrals
- Maintain activity to achieve production goals

Foundations Scorecard

- Learning Engagement
- Sales Activity
- Business Results

QUESTIONS

Week: WEEK 12 (07/17/2017 - 07/23/2017)

I met with a member of my leadership team for a coaching / accountability session this week.

Yes No

What went well over the past week?

held several open appointments

What might you have done differently over the past week?

Set more appts for after LMS Forum

What will you accomplish next week?

Will be at LMS Forum. Set more appts for when I get back

What can we be doing to help you be more successful?

Continue to support

TRAINING

Training Activity Scorecard

Due Week On Time 1 Week Late 2 or More Weeks Late

WEEK	APPOINTMENT SETTING VIRTUAL SESSION	APPOINTMENT SETTING VIDEO DEMO	PHILOSOPHY MEETING VIRTUAL SESSION	PHILOSOPHY MEETING VIDEO DEMO	PROTECTION ANALYSIS VIRTUAL SESSION	PROTECTION ANALYSIS VIDEO DEMO
PRE FOUNDATIONS						
WEEK 1 (05/01/2017 - 05/07/2017)	Completed	Completed				
WEEK 2 (05/08/2017 - 05/14/2017)			Completed	Completed		
WEEK 3 (05/15/2017 - 05/21/2017)					Completed	Completed
WEEK 4 (05/22/2017 - 05/28/2017)						Completed
WEEK 5 (05/29/2017 - 06/04/2017)						Completed
WEEK 6 (06/05/2017 - 06/11/2017)						Completed
WEEK 7 (06/12/2017 - 06/18/2017)						Completed
WEEK 8 (06/19/2017 - 06/25/2017)						Completed
WEEK 9 (06/26/2017 - 07/02/2017)						Completed
WEEK 10 (07/03/2017 - 07/09/2017)						Completed
WEEK 11 (07/10/2017 - 07/16/2017)						Completed
WEEK 12 (07/17/2017 - 07/23/2017)						Completed

PERFORMANCE

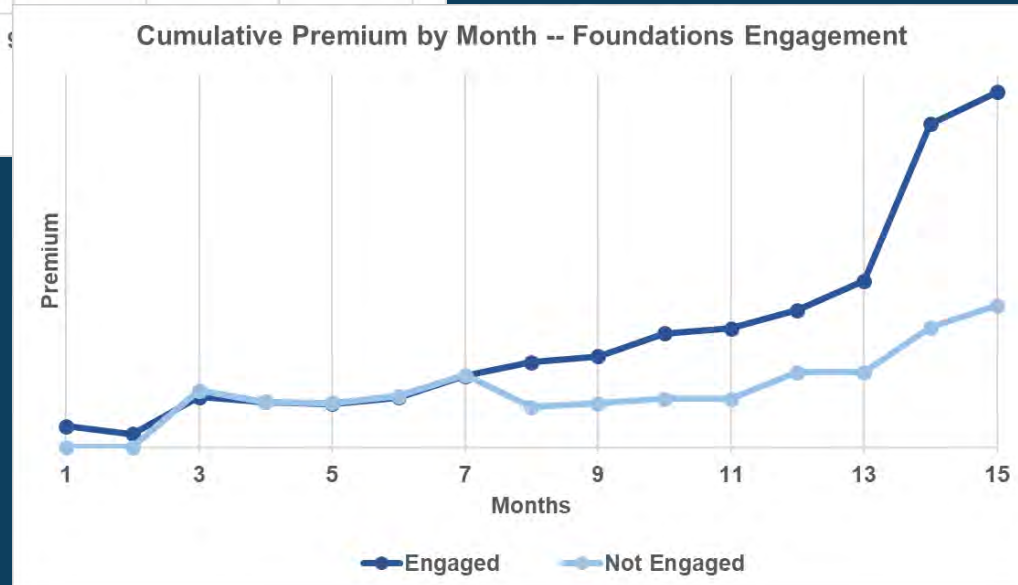
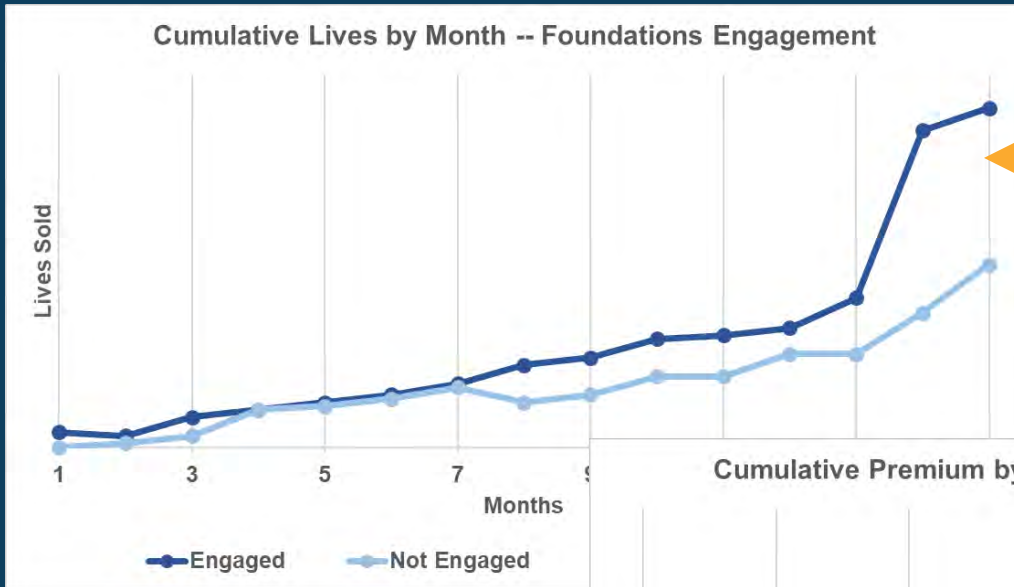
WEEK	NEW REFERRALS / CONTACTS	NEW CLIENTS WITH QUICK FACTS	APPTS SCHEDULED FOR NEXT 2 WEEKS	APPOINTMENTS HELD	APPS SUBMITTED	LIFE SUB
PRE FOUNDATIONS	Actual / Target	213 / 6	1	4	27.70	
WEEK 1 (05/01/2017 - 05/07/2017)	Actual / Target	97 / 20	0 / 2	0 / 5	0.90 / 0.50	
WEEK 2 (05/08/2017 - 05/14/2017)	Actual / Target	489 / 10	3 / 2	0 / 20	2.70 / 0.50	
WEEK 3 (05/15/2017 - 05/21/2017)	Actual / Target	27 / 20	5 / 2	1 / 20	4 / 5	1.40 / 0.50
WEEK 4 (05/22/2017 - 05/28/2017)	Actual / Target	7 / 10	4 / 2	1 / 20	5 / 5	1.80 / 0.50
WEEK 5 (05/29/2017 - 06/04/2017)	Actual / Target	0 / 20	0 / 2	14 / 20	0 / 5	0.00 / 0.50
WEEK 6 (06/05/2017 - 06/11/2017)	Actual / Target	8 / 10	0 / 2	11 / 20	6 / 5	0.00 / 0.50
WEEK 7 (06/12/2017 - 06/18/2017)	Actual / Target	0 / 20	0 / 2	15 / 20	4 / 5	0.00 / 0.50
WEEK 8 (06/19/2017 - 06/25/2017)	Actual / Target	0 / 20	7 / 2	11 / 20	5 / 5	0.90 / 0.50
WEEK 9 (06/26/2017 - 07/02/2017)	Actual / Target	1 / 20	2 / 2	17 / 20	0 / 5	0.00 / 0.50
WEEK 10 (07/03/2017 - 07/09/2017)	Actual / Target	1 / 20	0 / 2	20 / 20	4 / 5	1.00 / 0.50
WEEK 11 (07/10/2017 - 07/16/2017)	Actual / Target	0 / 20	0 / 2	15 / 20	4 / 5	2.00 / 0.50
WEEK 12 (07/17/2017 - 07/23/2017)	Actual / Target	0 / 20	0 / 2	15 / 20	6 / 5	1.80 / 0.50
TOTAL	Actual / Target	519 / 120	25 / 24	124 / 240	44 / 60	12.50 / 6.00

Focus on Key Performance

Connecting Learning to Business Results

Based on first cohort of inexperienced representatives:

- Increased activity - 86% more lives
- Increased productivity - 150% more premium



Data through June 30, 2018

Focus on Key Performance

Keep it simple!

Foundations Program 2018 YTD (FRs)

Regional Firm
(All)

Foundations Cohort
April 2017

Cumulative Premium by Month

Hi! This weeks virtual class covered appointment setting skills. Have you had an opportunity to create your appointment setting phone script?

Great! If you continue to stay on top of your homework, I know you'll succeed. Your role play group can help you practice these lines.



Prediction of Where Training Will Have Most Impact



Executive Summary Report - Foundations

Average Benchmark : Corporate Universities: Training Top 125

Business Results

The Business Results KPIs track business outcomes impacted by training. These metrics indicate the level of alignment between business objectives and the learning experience.

Predicted Results:

Of the responses received, the following indicated that the learning will have a positive impact on these business results.



Reported Results:

Of the responses received, the following indicated that the learning had a positive impact on these business results.



Build a Strong Business Case

Identify and track meaningful metrics

- Improve 4-year retention
- Increase new representative productivity

**Where We Started
(April 2015)**

New representative productivity

- Client Builder Award qualification: **11%**



**Where We Are
(October 2018)**

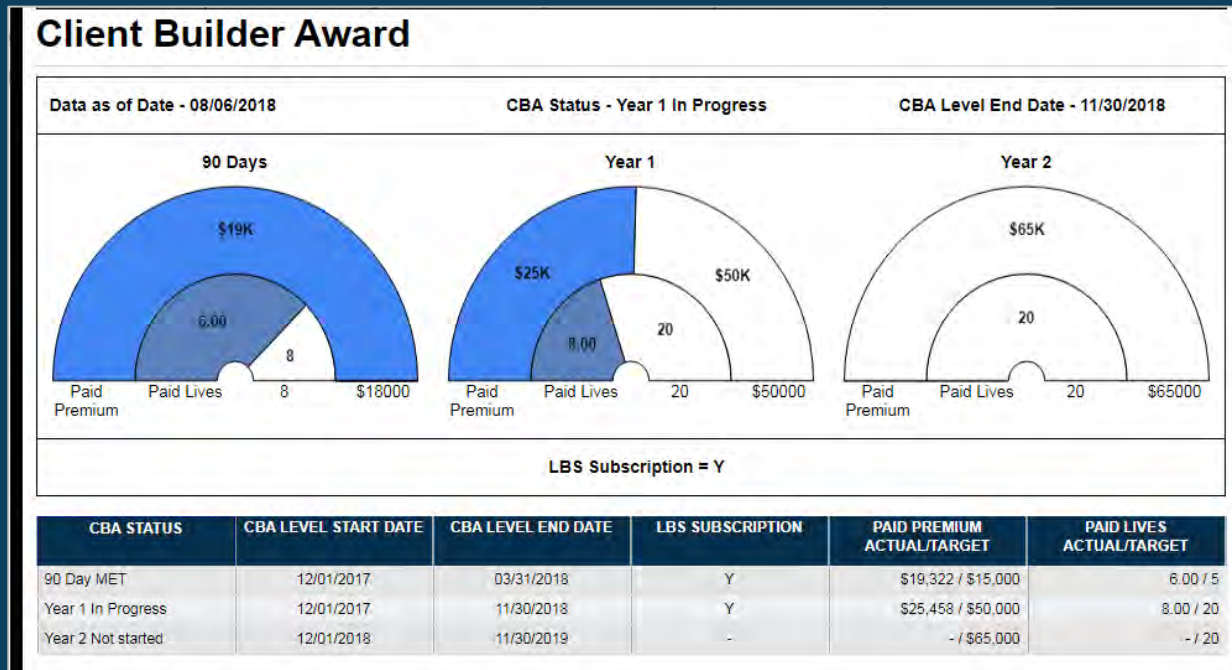
Foundations Participants who are still active:

- Client Builder Award qualification: **29%**

Build a Strong Business Case

Drive towards desired business results

- Select the right data
- Build systems to track it
- Recognize and reward performance



Interpret the Data

Partner with your company's data experts



Interpret the Data

When you get a surprise, dig for the underlying cause



QUESTIONS / DEMOS		TRAINING SCORECARD			PERFORMANCE SCORECARD		
Performance Scorecard		■ On Target ■ At least 70% of Target ■ Less than 70% of Target					
WEEK		NEW REFERRALS / CONTACTS	NEW CLIENTS WITH QUICK FACTS	APPTS SCHEDULED FOR NEXT 2 WEEKS	APPOINTMENTS HELD	APPS SUBMITTED	LIFE SUB
PRE FOUNDATIONS	Actual	213	6	1	4	27.70	2
WEEK 1 (05/01/2017 - 05/07/2017)	Actual / Target	0 / 10	0 / 2	0 / 20	0 / 5	0.90 / 0.50	0
WEEK 2 (05/08/2017 - 05/14/2017)	Actual / Target	489 / 10	3 / 2	0 / 20	0 / 5	2.70 / 0.50	2
WEEK 3 (05/15/2017 - 05/21/2017)	Actual / Target	2 / 10	5 / 2	1 / 20	0 / 5	1.40 / 0.50	1
WEEK 4 (05/22/2017 - 05/28/2017)	Actual / Target	7 / 10	4 / 2	1 / 20	0 / 5	1.80 / 0.50	1
WEEK 5 (05/29/2017 - 06/04/2017)	Actual / Target	1 / 10	1 / 2	0 / 20	0 / 5	0.00 / 0.50	0
WEEK 6 (06/05/2017 - 06/11/2017)	Actual / Target	8 / 10	1 / 2	0 / 20	0 / 5	0.00 / 0.50	0
WEEK 7 (06/12/2017 - 06/18/2017)	Actual / Target	0 / 10	0 / 2	0 / 20	0 / 5	0.00 / 0.50	0
WEEK 8 (06/19/2017 - 06/25/2017)	Actual / Target	4 / 10	7 / 2	0 / 20	0 / 5	0.90 / 0.50	0
WEEK 9 (06/26/2017 - 07/02/2017)	Actual / Target	1 / 10	2 / 2	0 / 20	0 / 5	0.00 / 0.50	0
WEEK 10 (07/03/2017 - 07/09/2017)	Actual / Target	1 / 10	0 / 2	0 / 20	0 / 5	1.00 / 0.50	1
WEEK 11 (07/10/2017 - 07/16/2017)	Actual / Target	3 / 10	1 / 2	0 / 20	0 / 5	2.00 / 0.50	2
WEEK 12 (07/17/2017 - 07/23/2017)	Actual / Target	3 / 10	1 / 2	0 / 20	0 / 5	1.80 / 0.50	1
TOTAL	Actual / Target	519 / 120	25 / 24	2 / 240	0 / 60	12.50 / 6.00	2

Above target for sales, but no leading activity??

Interpret the Data

Be scientific about ALL the data you collect

Name				
Agency/Role				
Date				
Interviewer				
1. General Intro				
2. Question				
<ul style="list-style-type: none">• Follow-up• Follow-up				
3. Question				
<ul style="list-style-type: none">• Follow-up• Follow-up				
4. Key Insights				

Interpret the Data

Drive actionable results

FORMULA FOR SUCCESS

- Attend the program
- Engage with the learning
- Have follow up support from agency leaders
 - Meet weekly to review progress
 - Roleplay practice

BUT . . .

- 28% of Foundations participants surveyed indicated they did not discuss a plan with their manager to apply their training back to the job
- 69% of Foundations participants indicated “no” or “no response” to whether or not they met with their manager 1:1 each week during Foundations

Get Over the Fear of Numbers!

"You can't manage
what you don't
measure."

- **Peter Drucker**

Lessons Learned from the Frontline

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