

## CASE STUDY

# Unum Takes Its **Sales Enablement** to the Next Level with Smart Automation

## About Unum

- Provides access to disability, life, accident, critical illness, dental and vision benefits through workplaces
- Services over 177,000 workplaces in the US and UK
- Protects over 38 million people and their families worldwide with almost \$7.2 billion in benefits paid each year

## Challenges

- Duplication of sales content in multiple locations
- Manual processes impacting ability to track content
- Existing tools were cumbersome to learn and use
- Time and resource-consuming classroom training

## Solution

- Automated role-based readiness programs
- Audio, video and written role-plays to develop skills
- Certification of skills and knowledge
- Detailed analytics by individual and team
- Enabled remote learning

## Impact

- Reduced training time in the first three weeks of onboarding by 60%
- Automatically push readiness programs to agents on Start Day
- Increased agent engagement and development satisfaction
- Improved insights into the effectiveness of enablement
- Reduced duplication of content leveraged across multiple roles and systems
- Consistent brand and enablement initiatives driven across the business

# 60%

Reduced Onboarding Time in the First 3 Weeks



Increased Agent Engagement & Development Satisfaction

“MindTickle helped us automate our content - a time-consuming process for us. Now we can automatically push content to employees from their first day on the job.”



Lisa Buonocore,  
Digital Learning Solutions Manager

## Transforming Unum's Enablement Programs

With ambitious growth plans, Unum is in the midst of digitizing their entire enterprise, leveraging technology to take them to the next level and achieve their audacious goals. Specifically, leadership was eager to see how the Unum enablement team could up-level and modernize training and get sales and customer-facing staff up to speed as quickly as possible.

In the past, Unum used a blended learning approach for sales training with facilitator-led classroom instruction and a mix of internal resource hosted in various locations. With transformation in mind, Unum's internal technology innovation team suggested MindTickle to streamline and automate their training and provide functionality that traditional LMS vendors couldn't support.

- Written, audio and video role-plays that both new hires and experienced staff use to improve messaging and delivery
- Ability to certify agents on new skills and products at scale
- Access to learning remotely while still receiving real-time feedback

## Comprehensive Data for More Productive In-Person Learning

Unum was able to launch their first program in just five weeks. This first program was designed as pre-work for a traditional classroom training session on a new product launch. Using MindTickle in this process meant Unum could:

- Track who completed their pre-work prior to attending class
- Assess knowledge gaps using easy-to-read heatmaps and dashboards
- Effectively use classroom time by addressing gaps in person, instead of repetitively discussing content agents already know
- Develop training and quick updates on MindTickle to resolve gaps and provide relevant content

## Maintaining Enablement Quality and Agility While Scaling

Unum devotes considerable time and resources to both efficiently and effectively onboard and ramp up new hires in compliance with industry regulations. By leveraging MindTickle to automate their readiness programs, Unum not only improves how they train but also optimizes how they use their training time. They achieved cross-functional skills transformation by:

- Launching training programs on a new hire's first day with automated rules & workflows
- Removing duplication and refining relevance by streamlining content across roles
- Reinforcing learning with quick updates and new training programs
- Driving accountability by tracking enablement activity of individual agents
- Measuring the development of skills using role-plays over time
- Improving content and delivery of training programs with relevant data
- Nurturing managers as enablement champions by sharing teams' "readiness" scores
- Ensuring regulatory compliance and message certification on specific areas of knowledge

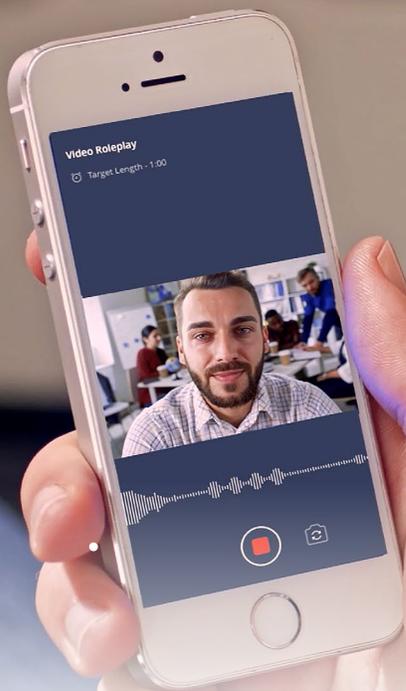
## Relevant, Engaging Content from Day One

With their sales enablement content now digitized, Unum sees endless opportunities to fine-tune and improve its readiness programs. With improving speed-to-market top of mind, Unum is focusing on initiatives that help them find new ways to be agile, including:

- Measuring their return on investment by correlating MindTickle data with sales results
- Onboarding and engaging new hires quickly and effectively while maintaining efficiency levels
- Preparing reps for new changes and disruptions in the broker market
- Leveraging MindTickle for client service initiatives
- Measuring elements of Unum's brand promise in the field
- Connecting training with gaps identified in recruitment assessments
- Continuing to reimagine how sales enablement curriculum is delivered

Unum has multiple customer journeys and wants to transform how they interact with their customers to improve the experience. From the design of its programs to the type of content they include, MindTickle is ready to help Unum achieve their goals.

*"MindTickle gives us data points that we haven't had before. We now leverage these to determine next steps before we create more training."*



Unum uses **MindTickle Missions** - the ability to do **virtual role-plays** and provide real-time feedback - to practice a variety of customer-facing interactions, including elevator pitches and written emails. Each one is evaluated on the same base of criteria: knowledge of the subject matter, organization, delivery, communication style and visual aid. Unum's enablement team then measures the progress of individual reps and cohorts over time based on these criteria to track improvement. They're also able to refer back to each Mission to review, or even share them as best practices with the rest of the organization.

“Our leadership is excited about the value that MindTickle brings to our onboarding and training processes for new hires, especially the data and reporting features that measures and tracks engagement.”

## About MindTickle

MindTickle provides a comprehensive, data-driven solution for sales readiness and enablement that fuels revenue growth and brand affinity. Its purpose-built applications, proven methodologies, and best practices are designed to drive effective sales onboarding and ongoing readiness. With MindTickle, company leaders and sellers can continually assess, diagnose and develop the knowledge, skills, and behaviors required to effectively engage customers and drive growth.

Companies across a wide range of industries use MindTickle's innovative capabilities for on-demand, online training, bite-sized mobile updates, gamification-based learning, coaching and role-play to ensure world-class sales performance. MindTickle is a global, privately-held company headquartered in San Francisco, CA.