

How Replacing Face-to-Face Onboarding with Mindtickle Increased Revenue for ORCA Life



Headquarters: Louisville, Kentucky

Founded: 2016

Company Size: 50

Industry: Insurance

“*Mindtickle has been a big reason for our fast growth.*”



Lindsey Curry
Agency Leader, ORCA Life

THE CHALLENGE



ORCA Life is a market leader in the final expense insurance industry. The company takes responsibility for providing the best products, trustworthy service, and sincere care to its clients. Even before the COVID-19 pandemic hit, they were experiencing a big challenge with agents getting access to training in the field. This was complicated even further once lockdowns went into place across the world, and the company had to quickly pivot from face-to-face selling to a telesales model.

THE SOLUTION



As the need for a more accessible training program only increased with the onset of the pandemic, ORCA Life turned to Mindtickle to help them reimagine their approach to boots-on-the-ground training.

The team at ORCA Life would recruit agents and executives to record tips and tricks which would be used as a foundation for their training programs within Mindtickle. They found that they could get reps to perfect their “door approaches” using Missions within the Mindtickle platform.

KEY RESULTS

After adopting the Mindtickle platform, ORCA Life had 35 power users who were regularly working in Mindtickle

Administrative staff and sales leaders saw a drastic increase in time saved

Training is not easier for reps to access, but the information is significantly easier to digest

Rethinking the whole go-to-market strategy

ORCA Life had big expansion plans for 2020. Then COVID-19 hit, and they had to rethink their entire go-to-market approach. Historically a face-to-face business, ORCA Life trained all new producers in person, followed by ride-alongs with more experienced people to show them how the sales process works. COVID-19 changed this for the ORCA Life team overnight.

In order to pivot their business, they signed up with Mindtickle to help quickly switch their business model from in-person to over the phone. One of ORCA Life's operating principles is "progressive business." The team says that one good thing that happened to their business as a result of the pandemic was their decision to use Mindtickle, which has helped them continue to be a progressive business even during such a challenging time.

When COVID hit, it stopped all of ORCA Life's production.



“ We signed up with Mindtickle to help us quickly switch our business model from in-person to over the phone. **”**

Lindsey Curry, Agency Leader, ORCA Life

Using top performers to share knowledge

ORCA Life got started with Mindtickle by moving existing training processes from other modalities into the platform. They began uploading their twice-a-week conference calls to the Mindtickle platform so they could be easily accessible later. The ORCA Life team also has their top agents recording their pitches so that new agents can see how it's done before they go out into the field.

In addition to this, they also have top performers and senior executives record short, bite-sized videos to share tips and tricks with the field. In the near future, ORCA Life plans to add a second layer to their first week of “boots on the ground” training using Mindtickle’s coaching and role-play capabilities. If, for example, someone is working on their door approach—their pitch when they first encounter a potential customer—they can use role-plays to identify words that should be emphasized or eliminated from the conversation.

Out of a user community of 125, ORCA Life has developed 35 Mindtickle power users.

The screenshot shows the 'Elevator Pitch Certification Exercise' interface. At the top, it says 'Home' and 'Elevator Pitch Certification Exercise'. Below this, there's a profile for 'Justin Moore' with a '2nd Submission' dropdown and submission details: 'Submitted: Sep 21, 2021' and 'Review Due: Oct 7, 2021'. A video player shows a man in a yellow shirt wearing a headset, with a progress bar at 0:37 / 3:54. Below the video are two performance metrics: 'Pitch Length: **Appropriate**' (LENGTH: 3m 54s TARGET: 3m 30s to 5m) and 'Pitch Pace: **Slow**' (WPM: 100 AVG WPM: 120 - 160). On the right side, there are tabs for 'Review' and 'Comments', a section for 'Suggested Keywords (8)' with eight empty input fields, and a 'Result: **Good Match**' box indicating '6 out of 8 keywords matched'.

ORCA LIFE SNAPSHOT

- * Average time-to-first-deal reduced from five to six weeks down to two weeks
- * 33% increase in revenue per agent
- * Increased overall production compared to the previous year

Replacing face-to-face onboarding with Mindtickle

The team at ORCA Life plans to revamp their onboarding program to replace two weeks shadowing an agent with a full week of Mindtickle training, followed by ride-along with agents for two or three days. Doing that will help them make Mindtickle the standard platform for all of their producers, not just the power users that are currently taking the most advantage of the platform.

They also intend to finish a comprehensive “tips and tricks” library that will provide easy access to the information agents need to be successful. Doing that will free up time for both administrators and sales leaders.

ORCA Life also attributes its success with Mindtickle so far to Mindtickle’s support organization. They’ve worked closely with Mindtickle’s support team and have built a great friendship over their weekly check-in calls. According to ORCA Life, Mindtickle has been a big reason for their fast growth, and it’s helping scale their business to unlimited potential.



“ It’s helping us scale this business to unlimited potential. ”

Lindsey Curry, Agency Leader, ORCA Life

mindtickle

Interested in learning more about how Mindtickle gets sellers ready for the moments that matter?

Get Started