

**PACIFIC LIFE***Pacific Life**Newport Beach, California**www.pacificlife.com*

How Pacific Life Leverages Allego to Drive Efficient Productivity

Overview

Pacific Life provides a wide range of life insurance products, annuities, and mutual funds, and offers a variety of investment products and services to individuals, businesses, and pension plans. Pacific Life counts more than half of the 100 largest U.S. companies as its clients. Peter Han is the assistant vice president of the Sales Support group at Pacific Life. In this role, Peter oversees four business units including Sales Training, Sales Efficiency and Innovation, Conference Planning and Sales Reporting while supporting a team of approximately 100 regional vice presidents (RVP's). Pacific Life has been a customer of Allego since January 2013.

Driving Efficient Productivity

Pacific Life is in a highly competitive market where products can look alike. RVPs need to ensure they have extra time to get to know advisors and build relationships. Any process or technologies that can save time or gain efficiencies are critical. Efficient productivity is a mantra and a core cultural value at Pacific Life.

In an environment where coaching is key, one of the biggest ongoing challenges is driving time efficiencies. Regional Sales Managers (RSMs) like to do ride-alongs with wholesalers, working with them in fine-tuning their sales skills and conversations, as well as working on how to position certain products. The issue: how can they effectively do ride-alongs with all their staff when in reality most of them are managing and overseeing a team of people? While RSMs target ride-alongs once per quarter, that's not realistic. In reality RSMs may do one ride-along per quarter and for top tier wholesalers, ride-alongs may occur only one to two times per year.

With advances in technology and the introduction of platforms like Allego, the advantages and effective gains made through video coaching trumps the time and scheduling of ride-alongs. Pacific Life's cultural orientation towards the benefits of video coaching coupled with the technology gains in mobile platforms, inspired their desire to implement Allego.

Implementing Best Practices

The initial idea in launching Allego was to share best practices. Pacific Life started with a Beta group that included four sales managers who each in turn identified two to three wholesalers with whom to do video coaching. Through the Beta testing, Pacific Life could gauge the effectiveness and utilization of Allego to com-

plement coaching efforts. Based on the Beta group's feedback, Pacific Life decided to implement Allego across the entire sales organization.

Allego in Action

Allego helps shave time from coaching, and reduces the time burden on people sharing success stories. Similar to how IT departments use advanced analytics to drive organizational efficiencies, Pacific Life has a multi-pronged strategy driving efficiencies and productivity. Allego is one tool that helps drive efficiencies on the sales side. Pacific Life wants to know if they deliver a message and actually move the needle with that advisor – it's part science (getting the time to see advisors) and art (what you do when you get that face to face). Allego helps ensure that the RSMs and wholesalers know how to leverage the face time they have with advisors.

Sharing and collaboration – improving the flow of communication and sharing best practices – are the key use cases of Allego. As Chris van Mierlo, CMO and SVP Sales at Pacific Life said, "the goal is to move wholesaling from an individual to a team sport." Gaining time efficiencies while increasing collaboration to ensure that Pacific Life provides the most value in its relationships with advisors.

Criteria for Success

Pacific Life had previously learned that if the technology isn't fast and easy, then it's a waste of time. After experiencing a prior video technology that made it difficult to upload, share and distribute video content, Allego proved intuitive and easy to use.

Additionally, RSMs wouldn't get on board unless they also understood 'what's in it for me.' With a senior management directive about coaching the middle 60 percent to see if the middle could move to the top bracket, sales wanted to ensure they had a more systematic and formalized approach to coaching. The top sales people were already fielding calls from sales managers, one off calls from peers, and doing the same presentations over and over again in team meetings. By developing an Allego video and then routing the people to your video, it saved time and became much more efficient for the sales managers. The majority of sales people want to hear from peers – especially top performing reps - so there were often peer-to-peer requests for presentations in Allego.

Internal Success Stories

After implementing Allego, one rep that was originally 21 of 40, moved to 4 of 40, and then qualified for Leader of the Pac, the top performer recognition group, which recognized the top 10% of all sales people.

Another example of success was when one of the most tenured Pacific Life reps was the quickest to adopt and the quickest to utilize Allego. He also had the highest number of views on Allego. He felt it was extremely simple to use and felt that if "a guy at my age can use this, then anyone can use it." He recorded short product and "from the field" videos that demonstrated to his own people that it is a platform that's simple, efficient and easy to adopt.

Pacific Life also has three major national sales meetings or conferences - January, May (Spring Training), and August (Summer Development). There is a contest associated with each major conference that showcases how to position a certain product, such as an income fund. Each wholesaler is asked to participate and submit

"It's great when a manager and a wholesaler use video to coach back and forth and have a good gem, a success story or work on how to position certain products - that enables us to build out a best practice library. Any wholesaler - especially newer ones or those struggling with certain products - can hop onto different Allego channels and see how others are positioning the products."

*Peter Han
AVP of the Sales Support Group
Pacific Life*

a five-minute video on that product or product line. The sales manager then judges and chooses the best submitted video. Eight teams submit their final top pick from which a final winner is selected and announced at the national sales meeting. The best videos are then shared across the sales team as a best practice. An interesting result of these exercises is that the wholesalers become much more self-aware of how good, or not, their pitch is, and instead of 'winging it' they are much more confident and consistent in their final positioning and pitch of the product. Pacific Life has even established what's called a Wholesaler Academy that takes newly hired salespeople through a multi-year curriculum, Allego's video coaching is a core component of this training program.

Future Plan

Pacific Life will continue to focus on coaching and sharing in 2016 and beyond. Peter anticipates adopting several new use cases for Allego to continue advancing Pacific Life's multi-pronged efficiency and productivity strategy.

For example:

- Use Allego to offset main stage presenters who are typically used at national conferences, especially those that are one-way in nature in presenting to the sales people.
- Insert weekly market updates from Pacific Life partners and thought leaders
- Film the national conferences and post the top four to five videos to share across the entire sales organization for ongoing access by tenured wholesalers and to help onboard new ones.
- Build out virtual libraries of videos that training pulls from to complement live training based on the needs of individual sales people.

Allego is great fit for an organization that's committed to fostering sales skill sets. With a senior management directive on driving productivity throughout the organization, Allego drives time efficiencies and the sharing of best practices with ease.

About Allego

Allego provides an intuitive sales learning platform that boosts sales performance by harnessing the power of mobile devices to transform enablement and training through video content sharing. With Allego's mobile-first platform, organizations can create and curate the best content from the field and corporate office to better train and collaborate with sales teams, without the time and expense typically associated with in-field coaching or on-site training. Users can easily access relevant, quality content, anytime, anywhere, allowing them to capture their best ideas, master their pitch and accelerate their performance. Tens of thousands of global users across a range of industries have adopted Allego to improve sales success. Explore further at www.allego.com.