

# OneAmerica Masters Virtual Selling Using Allego



OneAmerica® is one of the fastest-growing mutual insurance holding companies in the U.S. The OneAmerica network of companies offers a variety of products to serve the financial needs of policyholders and clients. Its products include retirement plan products and services, individual life insurance, annuities, long-term care solutions, and employee benefits.

**INDUSTRY:** Financial Services

**COMPANY SIZE:** 1,900

**LOCATION:** Indianapolis, Indiana

**WEBSITE:** [www.oneamerica.com](http://www.oneamerica.com)

## Situation: Adapting to Virtual Selling Quickly

OneAmerica® is one of the fastest-growing mutual insurance holding companies in the U.S. Its network of companies offers a variety of products to serve the financial needs of policyholders and clients.

The sales enablement team of OneAmerica's Retirement Services division supports more than 50 regional sales directors, regional vice presidents, business development directors, and various subject matter experts.

But the pandemic changed Retirement Services sales dramatically, as training meetings, product presentations, buyer relationship development, and sales follow-up all shifted to take place remotely. Even as conditions improved and in-person meetings and events returned, virtual components remained.

## Challenge: Building a Bridge from In-Person to Hybrid Selling

For an industry built on relationships, adapting to a new way of selling was challenging. At OneAmerica Retirement Services, Lexi Lucchese Weidman, Manager Sales Coordinators, and Rebecca McQuillan, Sales Coordinator, found that traditional approaches didn't always transfer easily to hybrid selling. The company needed to move quickly to adapt to this digital transformation and lead its team into a tech-driven new normal.

"Before the pandemic, the regional sales director's true bread and butter was popping into an advisor's office, dropping off collateral material, taking them to lunch. Those meetings definitely look a lot different now," said McQuillan. "Regional sales directors don't feel that those relationships are as strong when it's virtual, not face-to-face. And they're having a hard time monitoring the intention of that buyer."

## Solution: Implementing Allego to Connect with Clients

OneAmerica chose Allego as its sales enablement provider. Weidman and McQuillan rolled out the company's new virtual selling strategy to the regional sales team and created a playbook of all the virtual selling tools they could use along the sales life cycle of a plan.

"We found that Allego truly was the common thread through each of the steps of the sales life cycle and a great virtual selling tool," said McQuillan.

### Greater Personalization

The Retirement Services sales team quickly adopted the capabilities of Allego to improve virtual selling. For example, recording and sharing personalized videos for advisors.

"At the end of videos, you have the option to share a prompt. We popped in a QR code that populated all of the sales director's contact information, and the advisor could put it right in their phone," said McQuillan.

Directors were able to share all types of information to encourage advisors to take action, including registration links to webinars. This made it easy for advisors to share information since they didn't have to track down email invitations or go to a signature line to find contact details.

### Guided Sales Content

The team also used Allego's channel drop feature, allowing them to strategically time the launch of internal channels to specific users. They created a monthly motivator series focused on issues happening within the sales life cycle. The channel includes a sample video along with the talk track to give regional sales directors a guide for how they can curate their own video for advisors.

"It's all there within the end of the Allego video. That was really cool to be able to use that tool, to also launch other virtual selling tools," said McQuillan. "We curate those ideas to help sales directors create presence in their absence with advisors."

### Messaging Consistency

Another challenge the sales enablement team faced was improving messaging consistency. The company recently revamped its sales presentation and found that everyone had their own talk track.

"We noticed that, historically, everyone's been telling a different story. Our main goal is how can we tell the OneAmerica story? And how can everyone tell a 'like' story, even if they're telling it in their own way?" said Weidman. "We've been utilizing Allego to build out a learning course. Now, although everyone might tell their story in their own unique way, we're all singing from the same song sheet. It's been a huge help with that as well."

### Centralized Content in Digital Sales Rooms

OneAmerica also used Allego's Digital Sales Rooms (DSRs) to engage sellers and buyers, and saw wide adoption for multiple use cases across the organization.

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REBECCA MCQUILLAN,  
Sales Coordinator



Weidman and McQuillan originally pitched DSRs to regional sales directors as a way to curate a playlist, like a Netflix watch list of items that are really important to advisors, all in one area.

“DSRs are such a wonderful way to house all of the content in one place,” said McQuillan. “This is a helpful tool for advisors. They don’t have to sift through emails looking for that proposal you sent, or the piece about the OneAmerica story, or the letter of intent, or whatever that is. It’s literally all housed together. And being able to let them know there’s additional content with just a ping has been really, really useful. It’s something our sales leadership was excited about.”

While regional sales directors used DSRs to share content externally with advisors and their firms, Weidman and McQuillan used DSRs internally as a tool with their business development team to share product launch information. The BDRs then used the tool to capture what they learned at trade shows and share that with the regional sales directors.

“Even people who weren’t the primary Allego users, like relationship managers, plan managers, transition managers, began to use DSRs. It’s widespread throughout our retirement services division,” said McQuillan.

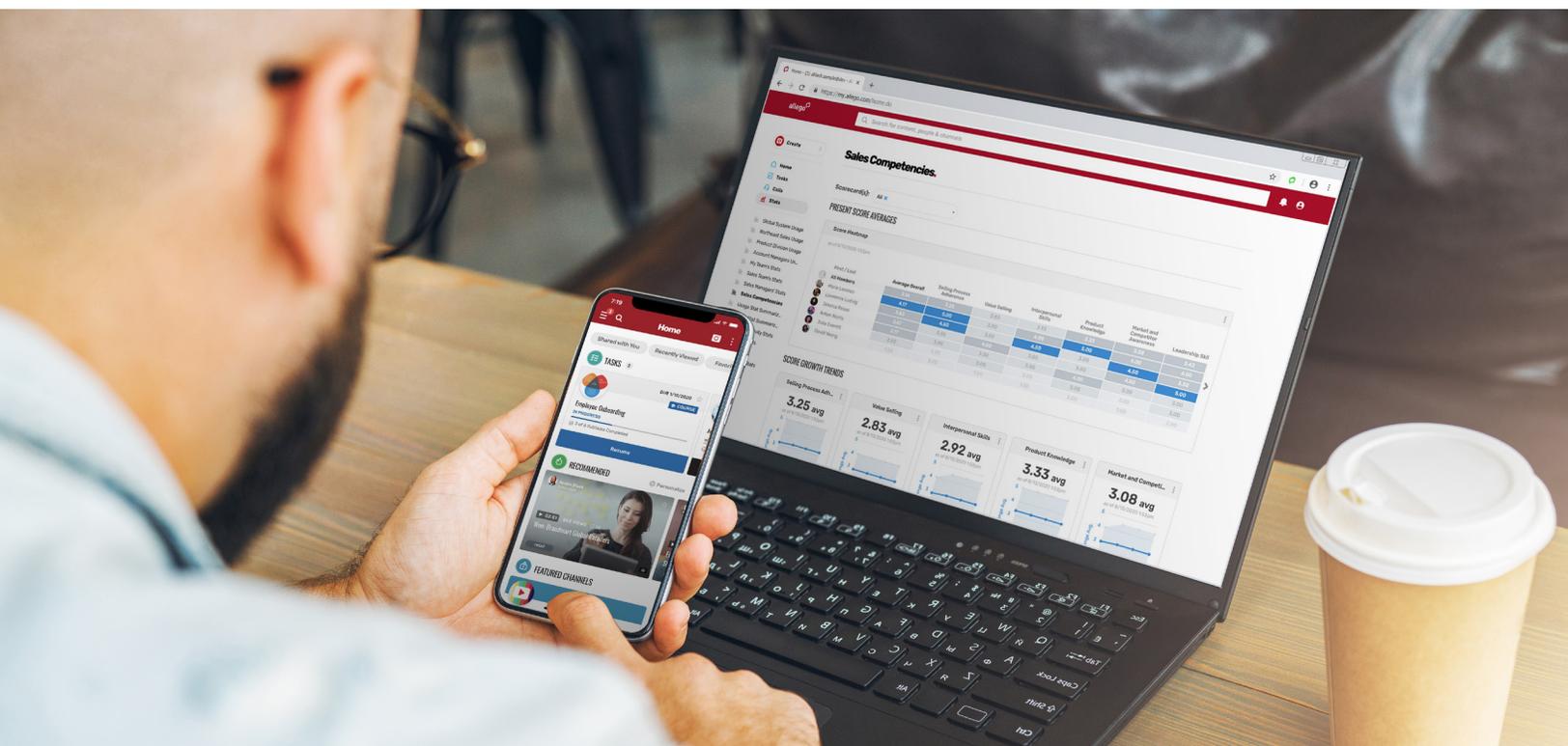
Lastly, the team also used DSRs to prepare for training meetings. Weidman and McQuillan host prospective plan sponsors or advisors for onsite due diligence visits at the home office in Indianapolis. They use DSRs to house all the information leading up to the visit, including the agenda, bios of people they’re going to be meeting with internally, and any other helpful information.

“It’s a one-stop shop to eliminate multiple emails, searching through emails and attachments,” said Weidman.

## Results: Improved Virtual Selling Using Allego

The OneAmerica sales enablement team quickly saw positive results from using Allego with sellers and buyers.

“At the beginning of the pandemic, we were quickly trying to figure out, ‘Okay, how are we going to touch our advisor partners now?’” said Weidman. “When we heard about Allego, we thought, ‘Oh, this is a perfect way, an interesting and unique way, to get in front of those advisors rather than an email,’ because who needs another email in their inbox?”



## Better Seller Adoption

When they rolled out the company's virtual selling strategy, Weidman and McQuillan began tracking which regional sales directors created videos on a monthly basis and shared a spreadsheet with each. It was a reminder to follow-up with internal sales managers to encourage them to use Allego and share success stories. They knew that since sellers are competitive, sharing these stories would breed buy-in from other sales folks.

One success story that stands out is about a particular regional director who was initially reluctant to use the new platform and the virtual selling tools Weidman and McQuillan had rolled out. He said, "I've sold how I've sold. This is successful. Why do I have to do this?"

When his territory shifted, he realized that he could share a video with his new advisors to introduce himself. He strategically sent short videos, one at a time, and worked with his internal sales manager on purposeful follow-up. It led to a really strong lead that is now a letter of intent for a \$6.5 million dollar plan.

This quickly grabbed the attention of the other regional sales directors. "I was excited for him, and all of the other regional sales directors who were late to the Allego train are now like, "Wait, wait, wait, wait, what happened? Tell me how you did that," said McQuillan.

## Better Buyer Engagement

In terms of buyer engagement, the company also saw the impact. One of the regional sales directors partnered with the team at Allego to create a Mastering Virtual Selling course. This three-part course was invite-only, specifically for advisors.

OneAmerica had seen a drop-off in engagement due to Zoom fatigue and was concerned this course would have low attendance. But they were thrilled to see a 95% or higher ratio of attendance to RSVP.

"That's unheard of, especially with this new fatigue. It told us that people are really itching to get all the information you can on being successful in a virtual world, because not everybody has that skill set," said McQuillan." Oh, somebody's going to be teaching me how to do this? How do I sign up? That's been an amazing piece related to buyer engagement," said McQuillan.



## About Allego

Allego is the future of sales enablement. Our sales enablement, learning, content management, and conversation intelligence products accelerate performance for sales and other teams. Allego is AI-driven and seller-centric, with the power, agility, insight, and ease you need to drive results in a hybrid world—all in a single app. Nearly 750,000 professionals use Allego to equip sellers with intelligent training, coaching, and content that engages and converts buyers.

Learn more about sales enablement that wins sellers and buyers at [allego.com](https://allego.com).

To learn how Allego can take your sales enablement efforts into a new era of success, [request a demo today](#).

