

Case Studies

See how our customers use Allego to train reps virtually, and foster greater communication and collaboration among geographically dispersed sales teams.



Global Atlantic Improves Sales Training Efficiency with Mobile Video Coaching

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– Jason Bickler, National Sales Manager, Global Atlantic



Qventus Rapidly Builds a Modern Sales Onboarding Program Using Allego

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workable

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Global Atlantic Improves Sales Training Efficiency with Mobile Video Coaching

Global Atlantic Financial Group, a U.S.-focused life and annuity company, totally revamped their sales process at the end of 2016 to support a fundamental shift in company strategy. Instead of multiple teams of wholesalers each selling a subset of the annuity suite, the company set out to consolidate three sales forces and cross-train everyone on all products. Wholesalers could then partner with financial advisors to help determine the right retirement strategy for the client along with appropriate products from across the entire platform to fulfill it. However, with a geographically dispersed field force, relying solely on in-person training wasn't a viable option.

Business Objectives

-  *Combine three sales forces and cross-train wholesalers on all products*
-  *Teach wholesalers to comfortably articulate the new corporate value message*
-  *Facilitate more coaching without additional time or travel*
-  *Coach wholesalers to effectively articulate investment strategies supporting all products*

The Challenge

Late in 2016, Jason Bickler, Global Atlantic's National Sales Manager, moved the company to a strategy-based wholesaling model, allowing Global Atlantic's wholesalers to take a more holistic approach with financial advisors to arrive at the best retirement solutions for their clients. With Global Atlantic's entire suite of annuity products at their disposal, they could now pivot to whichever product made sense for a particular client and advisor, instead of only offering one product type.

Bickler tasked Jennifer Zimmer, Assistant Vice President of Sales Training, with ensuring that the newly combined sales force could fluently articulate the value of Global Atlantic's new approach, as well as comfortably handle all offerings in the firm's broad annuity line. She had rolled out Allego's sales learning platform six months earlier to share best practices and effectively disseminate insight into market developments across the field. She decided to use Allego to tackle this job, as well, leveraging its video coaching capabilities.

Making it Happen

The team kicked off the initiative at the annual training meeting. Three DVPs introduced the overall concept of strategy-based wholesaling and demonstrated how to position Global Atlantic's products. The DVPs also recorded six short best practice videos to show wholesalers "what good looks like" and provide high-impact refreshers for later.

“We needed to make sure all wholesalers knew how to go through the stories the right way,” Zimmer said. “It’s not just the product, it’s also how you communicate the strategy supporting that product.”

The team decided to personalize the training around products wholesalers hadn’t already mastered to avoid investing time in the wrong places. However, everybody needed to understand strategy-based wholesaling. The first training exercise video asked: “What does it mean to be a strategy-based wholesaler?” Everybody had to understand the implications of the new model to effectively articulate its value.

Wholesalers first watched the DVPs’ best practice video describing strategy-based wholesaling and then recorded themselves explaining the approach. The wholesalers submitted responses that Allego routed back to their managers for feedback and scoring. “We wanted everyone’s answers to be consistent, but didn’t want them to sound like robots,” Zimmer said.

Bird’s-eye View

Managers watched their teams’ videos whenever they found a moment and provided feedback and scores from the convenience of their mobile devices. Zimmer and Dan Barker, Assistant Vice President of Sales Technology, monitored usage in Allego to see exactly what kind of feedback the DVPs were giving.

“If we saw one DVP giving 5 out of 5 ratings for everything and putting really generic comments throughout the videos, then we would suggest they give more specific feedback: that maybe the wholesaler did A and B well, but needed more work on C,” Zimmer said.

They closely tracked wholesalers’ responses as well. When reports showed feedback indicating a wholesaler missed one or two key points, Zimmer and Barker checked whether the wholesaler took note. “You could see if they went back and watched the best practice video,” Zimmer said. “Some of them would go back and watch to 100% completion three or four times, and then record two or three practice takes before resubmitting.”

She and Barker would then look at DVPs’ comments throughout the new submission to see if the rep addressed the points. Zimmer worked with Compliance to approve exceptionally good videos for placement in the Allego best practices channel for sharing across all wholesalers.

The team followed the same process for the rest of the exercises. “From the beginning we wanted to be sure it wasn’t too overwhelming for wholesalers and DVPs, and that they really saw the value in it,” Zimmer said. She quickly saw stronger, more consistent messaging throughout the newly combined field force as coaching interactions quadrupled from only once per month to once per week.

The Road Ahead

With multiple successes under their belt, the team took on the next challenge: mastering the components of a “perfect” meeting. “DVPs traveling with wholesalers noticed some were getting stuck going through certain standard meeting steps,” Zimmer said. “They’d see one wholesaler spending too much time on the rapport-building step, or another basically ‘winging it’ and not following much of the process at all.” So the team rolled out another initiative to revisit the seven steps to a great meeting, which they’d trained on earlier in the year.

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Initial results look promising. “We’ve done three exercises so far and the wholesalers are really engaged, knowing they’ll get the best practice videos out of it like last time,” Zimmer said. She created the first exercise video asking wholesalers to reflect on the meeting step they’re most passionate about, and then record a two to three minute video discussing why.

“They really embraced the exercise,” said Divisional Vice President Andrew Resnik. “It’s clear that just the process of recording these videos helped everyone because it forced them to reflect on core meeting skills and why there’s always room to improve.” The videos demonstrated that, despite some hiccups during ride-alongs, the training was sticking.

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About Allego

Allego’s sales learning platform supports all types of learning in an engaging, convenient and effective way through the use of mobile and video. Tens of thousands of sales professionals learn to sell more effectively using Allego. With Allego, sales organizations accelerate time to competency, accurately deliver on message, confidently handle objections and effectively articulate value.

Explore further at www.allego.com.



Qventus
Mountain View, CA
www.qventus.com

Challenges

-  Create the content necessary for a one-person enablement team to build a robust onboarding program in a short time
-  Design, build and deliver a formal sales onboarding program almost overnight
-  Promote greater communication and collaboration among members of a geographically dispersed sales force
-  Reduce ramp times for new hires and shorten the time it takes for reps to get to critical stages of the sales process
-  Help new employees “feel at home” immediately by remotely introducing them to the company’s culture, as well as their colleagues and managers

Qventus Rapidly Builds a Modern Sales Onboarding Program Using Allego

Qventus is a fast-growing company whose mission is to simplify how healthcare operates. Named one of Fast Company’s Top 10 Most Innovative Companies in Health for 2018, the company provides a comprehensive “system of action” that enables hospitals and health systems to optimize patient flow by incorporating modern principles of behavioral, management, and data science.

As its growth accelerated, the demand for the Silicon Valley-based firm’s solutions rapidly outstripped the capacity of its small sales force, pushing it to hire new talent at a much faster rate.

“In the early stages of our company, we never really put together a standard onboarding program,” says Pete Giliberti, Director of Sales Training and Enablement. “It was more baptism by fire.”

The Need for Speed

Giliberti knew he needed a formal training program to quickly onboard a slew of new reps if the company was going to hit its sales goals. And with an almost totally remote workforce, he wanted a platform that would promote communication and collaboration among the reps without requiring them to be in the same location.

He also knew the key to attracting and retaining top talent was to boost engagement among new hires, so it was critical that the onboarding process would introduce them to the Qventus culture and make them feel right at home quickly.

A big part of the challenge was creating the content that was necessary to building a robust onboarding program in the short time that he had to do it.

Qventus’ VP of Sales recommended Allego’s sales learning and readiness platform, and as soon as Giliberti saw its mobile video capabilities he was sold. “I didn’t need to look anywhere else. I’ve never seen that kind of functionality in any other platform,” he says.

By choosing Allego, Giliberti was able to build a high-quality sales training and enablement program almost overnight, creating several courses before he even went through implementation training with Allego's customer success team. Giliberti quickly saw reduced ramp times as he melded a group of geographically distributed reps into a cohesive team with a strong corporate culture. "There is no way I could've built and delivered an onboarding program with such high production value by myself in such a short amount of time without the Allego platform," he says. "And the program is already proving to be effective: we've now got reps reaching a critical milestone in our sales process within the first three months of getting hired. That used to take six months."

Learning on the Go

"Not only did Allego give us the tools to build and execute a really successful onboarding program for new members of the sales team, but it also gives us the ability to conduct ongoing training, coaching, and deal prep remotely as they continue in their development process," he adds. "It lets us provide coaching and feedback in real time without having to coordinate schedules where everybody on the team (or on a deal) can get together to review or go through new product training."

For Qventus, the ability to share knowledge and access content on the go is critical to successful onboarding and continuous learning.

"A lot of times, people want to do dry runs for an important meeting, and it can be really challenging to get the four or five people that should be involved to give that person feedback at a single time. Being able to have a new hire record themselves—which forces them to practice—and then submit on their own time so the rest of the team can provide feedback is hugely important for a geographically dispersed team like ours."

Democratized Learning Content Creation

Allego's platform has also proven to be a fast and convenient mechanism for Giliberti—as well as sales reps, marketing professionals, and other employees—to create valuable learning content on the fly. This content is critical for not only sales onboarding, but also for the entire go-to-market organization's continuous learning and coaching programs.

Qventus' continuous learning and training practices are powered by user-generated content created in Allego. Some of these practices include:

- **Field updates and rapid knowledge sharing.** Whenever the sales force needs more information or background on a relevant topic, "I'll create a quick five- to seven-minute video, and post it to the continuous learning channel," says Giliberti. "Before our weekly meetings, I usually send an email with links to the new training content so everyone can access the information in Allego. I also use the ability to insert links into the videos that lead to other content, so there are multiple avenues taking reps to the same place."
- **Sharing best practices.** The "sales sandbox" is where team members share their best practices and answer questions. "Someone might come out of a meeting after saying something that worked really well, and they'll create a quick video. 'Here's what I said, why I said it, and how the customer reacted.' It's a place where everybody on the team contributes. One of my reps records himself in Allego making cold calls. Other reps get to listen to what he's saying and what prospects are saying back—which is awesome. And it didn't require any extra effort. He just hit record and went about doing cold calls for an hour," Says Giliberti. He can then quickly add quiz questions, interactive prompts, or chapter markers and then place these pieces of content into learning paths or on-demand video channels and playbooks.

"There is no way I could've built and delivered an onboarding program with such high production value by myself in such a short amount of time without the Allego platform," he says.

- **Point-in-time coaching.** “As reps go through onboarding, each one is given their own feedback channel. I have access to it, they have access to it, and their direct manager has access to it. So they receive feedback inline on any recorded exercise videos that they do. At any time, I can go to that channel and look at all the feedback they’ve gotten in order to help managers fine-tune their coaching.”

Using Allego, the company also built a library of learning resources on topics ranging from healthcare operations and technology to meeting preparation. “It’s a one-stop shop for basically any information or tools the sales team needs for a deal,” says Giliberti.

If Giliberti were solely responsible for creating and distributing this content, he would never be able to keep up. “I’m one person. I don’t have a team that’s supporting me and building this. I’m doing all of the onboarding, all of the coaching across the team, and designing, building and delivering the training. Fortunately, Allego is a very easy-to-use tool that’s super intuitive so I can lean on others in the organization to create content. They simply record themselves on sales calls or while prepping for meetings and I can then use that content to show other reps what ‘good’ looks like.”

Strengthening Company Culture and Engagement

To date, Giliberti has seen excellent engagement with Allego among the reps. One new hire said that the Qventus onboarding program was better than his previous company’s—a well-established company with 7,000 employees.

In addition to promoting collaboration, Allego has strengthened the company culture. The platform helps new hires feel right at home faster and reassures them that they made a wise choice in joining the company. It also gives Giliberti and other managers more presence with their teams by remotely introducing new hires to their bosses and colleagues before they meet in person.

“Salespeople know there’s a certain level of risk involved with joining a smaller company at an early stage of its life cycle. Working with a platform like Allego for onboarding and continuous learning—and seeing the high-quality learning content and programs the platform lets you produce—promotes the idea that they made the right choice to join us. It helps reps feel more comfortable quickly because of the structure and level of professionalism that Allego brings to our onboarding and other learning programs.”

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About Allego

Allego is a modern sales learning platform that combines training, practice, coaching and knowledge sharing into one app. It uses mobile, video, and peer collaboration to reinvent learning for the dynamic needs of sales teams. Allego’s speed and consumer app design match the pace of even the most hard-charging salespeople. If you can use Netflix, you can use Allego. With Allego, sales teams onboard faster, confidently deliver the right messaging, rapidly adopt best practices, coach and practice more frequently, and collaborate broadly with peers and the home office. Over 100,000 sales professionals across financial services, technology, life science and other industries use Allego to ensure they bring their A game to every customer conversation.

Workable Drives Collaboration and Faster Ramp Using Allego

With a multinational sales force spread across five continents, software provider Workable needed a way to remotely train hundreds of employees. In the past, they'd relied on infrequent group training sessions of which their VP of Sales, Mike Manzi doubted the effectiveness.

The firm also needed to improve communication and collaboration among its geographically distributed reps, some of whom speak English as a second language.

A final challenge, according to Manzi, was "making sure I have learning content that will be engaged with – content relevant for everybody; content that I know has been shared. **I want to make sure that the 'A' player can share what works with the middle of the pack.**"

"Mobile is the Most Critical Piece"

Manzi looked at several options, including Brainshark and MindTickle, but these didn't seem like the right solutions for a mobile sales force.

"I needed something that could focus on the human aspects of training. Something that could help me bring my geographically dispersed team closer together. Other solutions were limited in their content creation capabilities, particularly compared to Allego. Allego is like YouTube for training videos," Manzi said.

But the main reason for choosing Allego was its mobile video capabilities.

"Mobile is the most critical piece for our organization. Ninety-percent of our day is spent on our phones, so if we have a training tool that doesn't fit our lives and the way we want to learn, we will never use it."

Since adopting Allego, lack of use hasn't been an issue. In fact, many reps have grown so fond of it that they are using the platform in unexpected ways.



**"Allego is like
YouTube for training."**

*Mike Manzi, VP of Sales,
Workable*

*The average onboarding training duration has dropped from **14 hours to four hours**. Ramp up time has decreased from **nine months to six months**, “and those deals have been for three times the average value that they used to be.”*

*Mike Manzi, VP of Sales,
Workable*

A Substitute for Other Collaboration Tools

Before rolling out Allego, for example, reps in the different time zones expended a lot of effort trying to schedule meetings and collaborate via email or Slack. Today, “we actually use Allego videos to talk to each other,” Manzi said. “We share our screens, show each other what’s going on, and ask each other questions.”

In addition, managers are taking just-in-time coaching to a new level, using mobile video to coach actual sales calls and provide dictated audio feedback. “They’re delivering very quick feedback using the mobile app. While it’s fantastic to give people feedback via text, it’s even more powerful when I can listen to a person’s call and immediately start saying what I want the rep to say next time.”

Manzi also uses the platform to ensure that everyone absorbs key information from the Monday-morning meetings no matter where they are. Before Allego, meetings were typically attended by three-quarters of the global team because of time zone differences. Now that the team records the meetings in Allego, salespeople can listen via smartphones and tablets when convenient—putting the percentage of reps tuning in closer to 100%.

“For the first time, I can actually send that meeting to every single person. Allego’s reporting gives me visibility into whether people are watching and paying attention.”

Peer-to-Peer Training

Another benefit of mobile video is facilitating peer-to-peer training. Armed with the ability to record short “how-to” videos whenever the need arises, many reps now serve as ad hoc trainers and coaches. For example, when someone has a question during a meeting, another attendee invariably volunteers to create a quick training video to answer the question.

“Recently we rolled out three new types of slides we wanted to show. Originally, my plan was to train the team myself, but thanks to Allego, my team leads were asking me, ‘Can I help be involved in training the team?’ So instead of training the team solely with content created by the enablement department, which we know is not trusted as much as content created by other reps, my team leads created content for each one of those slides.

“For the very first time, team leads have the ability to score other people’s videos. So my team is getting scored by their peers on the things they are doing right and wrong. This not only helps get the messages across more effectively, but helps the team learn faster. It also helps the team leads learn and retain new skills.”

Higher Engagement = Faster Learning

Whereas Manzi once had trouble motivating team members to read learning content and perform skill-development exercises, Allego has driven engagement through the roof.

“I would tell everyone to do something, and it wasn’t getting done. So I asked one of my team leads to create a video. They created a quick video on Allego, and shared it with the whole team. When I looked at my stats on Allego, I saw that the video was viewed more times than the number of people on our team. Everyone ended up referring back to it.”

“Every single time someone has a good sales call, they are putting that into Allego, and they are putting it right into the ‘Account Executives’ channel so everybody else can get access to it. Instead of reps having to schedule calls with other reps to hear what they are doing, they listen to it on the subway ride home, and learn all the same skills without me trying to do anything. They are just seeing other reps and saying, ‘How do I do that? Oh wait, I can go to Allego.’”

“Because we are a global organization, we have global challenges. One of those challenges is people who speak English as a second language. Because of the closed caption functionality within Allego, people are able to follow along more easily when they can’t listen as quickly as a native English speaker can talk,” Manzi said. “And we’re really excited for Allego’s upcoming text translation feature to make this even easier for folks.”

As a result of increased engagement and asynchronous communication, reps’ learning time has accelerated. The average onboarding training duration has dropped from 14 hours to four hours. Ramp up time has decreased from nine months to six months, “and those deals have been for three times the average value that they used to be.”

“In our Allego environment, we have all the sales components that we want someone doing for onboarding. We have tips and tricks—one-minute videos for someone to get better at their job. We also have operational content—a whole video channel on how to create an opportunity, how to create a quote, how to get a HubSpot email set up, and how to do everything in Salesforce.”

“It’s all in there in small snippets, so people can quickly pick up what they need to learn instead of spending hours in a training session,” Manzi said.