

Step up to the PLATFORM

Discover 4 key benefits
of digitally training your
distribution partners and staff.

by ANGELA TRAMONTELLI, MA

“ You can also get all necessary preliminary knowledge out of the way for the largest proportion of your employee base in one fell swoop. Once you establish this, you’re already 75 percent of the way home. ”

NICK ARGOL *director of training and product, CBLife.*



How do you ensure that your team members and staff are fully trained, without investing costly resources in continuous onsite trainings and development programs? For many, Global Bankers Insurance Group included, e-learning via digital training platforms is providing the solution. Global Bankers is now building one such learning management system (LMS) for its team members and key partners alike.

In the age of digital transformation, unless you’re integrating technology into more areas of your insurance business, you’ll be left behind as insurtech companies gain dominance. Tech savviness is no longer a perk; it’s critical for survival. In response to these rising demands in technology, Global Banker’s training portal is the next step forward in the digitization.

CBLife Achieve explores the key benefits that integrating a digital training system will bring to your insurance business. Nick Argol, director of training and product at CBLife, and Gina Canarr, corporate training manager at GBIG, join our discussion.

1 GREATER EFFICIENCY. The use of digital training portals helps to streamline your operations. Says Canarr, “The new portal has a new look and feel which is modeled after the Global Bankers website—streamlining menus, simplifying navigation, and building a responsive layout for providing information on our products and services.”

“We’ve outgrown previous training methods, which were primarily classroom-based,” adds Argol, and time constraints are prompting a move to a more digital knowledge base. By implementing an infrastructure that allows for renewed and updated training opportunities, your business eliminates the added expense as well as added burden on HR.

Labor-saving: You can also get all necessary preliminary knowledge out of the way for the largest proportion of your employee base in one fell swoop. Once you establish this, Argol says, you’re already 75 percent of the way home. Technical information or information about processes and procedures are also particularly well-suited to digital formats, he continues.

You want your new team members to be as productive and successful as possible, as quickly as possible—and for more experienced team members to have the resources they need to continue to perform the best in their roles. With digital training platforms, if at any time tasks aren’t sticking, employees themselves can access the materials to get a refresher.

Convenience: An added bonus of learning materials being available 24/7 is that employees are free to access them throughout the workday as well as on their own time. Employee induction training, for instance, can be streamlined and sped up in this way.

2 COST EFFECTIVENESS.

Digital training platforms are cost effective—which certainly benefits your bottom line. Housing your internal training completely online eliminates the need to hire different instructors or otherwise invest in outside resources. Your business also sees more ownership over each aspect of the development and implementation of your training.

There is also no longer a need to keep investing in new training materials, because the same material can be stored and reused for unlimited training sessions. You can constantly refresh your content to keep current, without shelling out additional funds for new outside training opportunities.



WELCOME: SINA CANARR LESSON

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My Training

Title	Status
Products	100% complete
ER Global	50% complete
Compliance Training	100% complete
Information Security	Complete 04/15/2017 0% complete
Privacy - GLBA	Complete 04/11/2017 0% complete
Prevention Discrimination & Harassment (Non-Supervisor)	Complete 04/11/2017 0% complete
Compliance Training (Supervisory)	100% complete
PPD Training (Offshore) - Billing & Accounting	0% complete
PPD Training (Offshore) - Policy lesson	0% complete
PPD Training (Offshore) - Customer Service	0% complete
California Claims	0% complete
Products Training	100% complete
MS Office Training	100% complete
AM Best Training	0% complete
Workshop Training	0% complete
Title	Status

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3 IMPROVED ENGAGEMENT.

Your team members are intelligent adults, and digital training platforms will appeal to their nature as self-directed and goal-oriented learners. They will appreciate feeling like they are more active participants in the training process, and this applies to external partner access to the portal as well. Says Canarr, “Once appointed with CBLife, agents receive an automated welcome email providing a hyperlink to access the training portal. Both elective and mandatory training is offered with simple hyperlinks for agents to access to specific product training.”

Train and Retain Millennials

Especially as the proportion of the workforce made up of tech savvy Millennials grows, digital portals are becoming a preferred method for internal training because of its accessibility and appeal to a workforce of digital natives. The portal’s interactive nature enhances engagement for a better user experience catered to today’s media-astute workforce. “Employees are offered access to training videos, links to a variety of offerings including MS Office training, A.M. Best, Skype, etc. A ‘Test Your Knowledge’ venue is coming soon offering product quizzes on all CBLife product offerings with results captured within personal transcripts,” says Canarr of the new training portal.

Personal touch: You can also create customizable content that’s tailored to each employee or department’s needs, effectively creating individualized learning paths. This in turn helps to boost employee engagement. While this is a distinct benefit all its own, it has the added bonus of making your team feel that their training is relevant, and helping them engage more with the personalized material. Agents can even access their transcripts of product training completions, adds Canarr.

4 EASY TO ADAPT, MANAGE, AND UPDATE.

From on-boarding training, to company-wide training, to department or job role specific training, there are a lot of different programs you likely encounter a need for. Digital training makes all of this possible within a single system, and allows you to inventory and keep current all of your training materials.

This includes space for multimedia support—you have the tools available to add images, audio, and video to your training materials. Argol advocates for the use of animated voiceover training videos that you can assign to various groups of employees regardless of their roles, and then moving onto more specialized training for individual roles.

Product Details Made Accessible

At CBLife, for example, digital platforms are also used to create product-specific annuity training. Argol explains, “The guidelines for what is and is not acceptable are very broad, so it’s good to create short 10-12 minute product presentations that dive into the technical aspects of a product, while keeping it light so it’s also a scripted video presentation of the product.” In this way, distribution partners and customer service employees can all easily access the specialized information and gain familiarity with the company’s products that they need.

You can also update content easily, and as often as you would like—allowing you to make sure that your information is as current and relevant as possible to your team members’ needs. There will be less of a lag between new policies and information and their implementation—this means that any changes or updates will not interfere with productivity.

Test for Success

You can even easily incorporate assessments into your training programs. This will allow you to monitor your team’s progress and help them to achieve their best. You’ll know when to provide additional support, or when to challenge your team members to be even better.




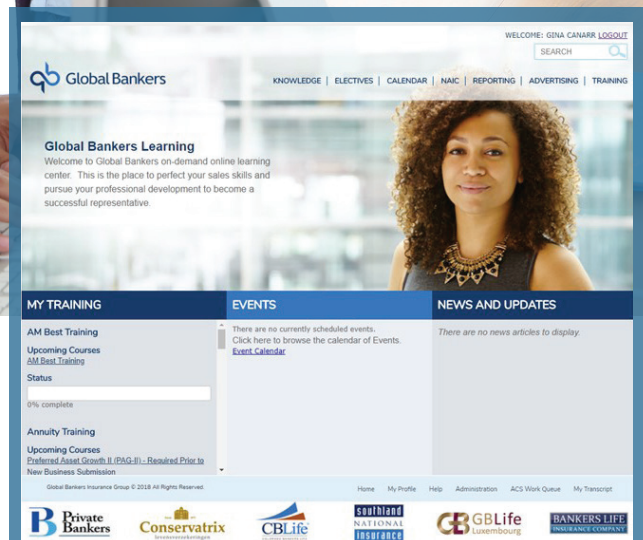


Balance Digital with Face-to-Face Teaching

But the most important key to working with digital training platforms? According to Argol, that's striking the right balance of digital instruction with good old fashioned face-to-face support. Digital training is a great resource, but especially for customer service or other client-facing roles, good training needs the reinforcement of human interaction.

"It is tedious to show someone how to use a spreadsheet. But to walk somebody through how to handle a complaint from a customer or resolve an issue with a team member is more of an artistic interpretation," Argol says. He likens it to the difference between learning the notes to a song and seeing a live performance.

The goal: Set up your LMS so that you provide connectivity to link digital information with experts, both internally and externally, facilitating the sharing of information as well as the contact between those face-to-face encounters needed for success. Of GBIG's new training portal, Canarr finishes, "We encourage everyone to visit and explore the site, discovering the full spectrum of educational collateral within the portal." 



Accessing the portal:

External customers (agents, agencies, advisors, etc.) can access the portal through the CBLife website (www.cblife.com) through single sign-on functionality, says Canarr. Just sign in as usual by clicking on "Sign In" on the home page.

Internal customers (employees) can access the portal through the hyperlink cbl.pinpointglobal.com/Portal/ by logging in.

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