

# Unum Takes Its Sales Enablement to the Next Level with Smart Automation

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Founded: 1999

Company size: 9,400

Industry: Employee benefits

Headquarters: Chattanooga, Tennessee

“*Mindtickle helped us automate our content – a time-consuming process for us. Now we can automatically push content to employees from their first day on the job.*”



Lisa Buonocore  
Digital Learning Solutions Manager,  
Unum

## THE CHALLENGE



Unum is in the midst of digitizing their entire enterprise, leveraging technology to take them to the next level and achieve their audacious goals. Specifically, leadership was eager to see how the Unum enablement team could up-level and modernize training and get sales and customer-facing staff up to speed as quickly as possible.

In the past, Unum used a blended learning approach for sales training with facilitator-led classroom instruction and a mix of internal resources hosted in various locations. With transformation in mind, Unum's internal technology innovation team suggested Mindtickle to streamline and automate their training and provide functionality that traditional LMS vendors couldn't support.

## THE SOLUTION



### **Comprehensive data for more productive in-person learning**

Unum was able to launch their first program in just five weeks, which was designed as pre-work for a traditional classroom training session on a new product launch. Using Mindtickle enabled Unum to track who completed their pre-work prior to attending class and access knowledge gaps using easy-to-read heatmaps and dashboard. This meant Unum could more effectively use classroom time by addressing gaps in person, instead of repetitively discussing content agents already know. The team was also able to develop training and updates on Mindtickle to resolve gaps and provide relevant content.

## KEY RESULTS

# 60%

**REDUCTION IN TRAINING TIME  
IN THE FIRST THREE WEEKS OF  
ONBOARDING**

**AUTOMATICALLY PUSH  
READINESS PROGRAMS TO  
AGENTS ON START DAY**

**INCREASED AGENT  
ENGAGEMENT AND  
DEVELOPMENT SATISFACTION**

**IMPROVED INSIGHTS INTO THE  
EFFECTIVENESS OF ENABLEMENT**

**REDUCED DUPLICATION OF  
CONTENT LEVERAGED ACROSS  
MULTIPLE ROLES AND SYSTEMS**

**CONSISTENT BRAND AND  
ENABLEMENT INITIATIVES  
DRIVEN ACROSS THE BUSINESS**

# Maintaining enablement quality and agility while scaling

Unum devotes considerable time and resources to both efficiently and effectively onboard and ramp up new hires in compliance with industry regulations. By leveraging Mindtickle to automate their readiness programs, Unum not only improves how they train but also optimizes how they use their training time. They achieved cross-functional skills transformation in a number of key ways.

For starters, Unum launches training programs on a new hire's first day with automated rules and workflows and removes duplication and refines relevance by streamlining content across roles. Unum also reinforces learning with quick updates and new training programs and drives accountability by tracking enablement activity of individual agents. In addition, the company measures the development of skills using role-plays over time and improves content and delivery of training programs with relevant data. Finally, Unum nurtures managers as enablement champions by sharing teams' "readiness" scores and ensures regulatory compliance and message certification on specific areas of knowledge.

“*Mindtickle gives us data points that we haven't had before. We now leverage these to determine next steps before we create more training.*”

Lisa Buonocore, Digital Learning Solutions Manager, Unum

Within the first three weeks,  
Unum reduced their onboarding time by **60%**



# Relevant, engaging content from day one

With their sales enablement content now digitized, Unum sees endless opportunities to fine-tune and improve its readiness programs. With improving speed-to-market top of mind, Unum is focusing on initiatives that help them find new ways to be agile.

First, the company is measuring their return on investment by correlating Mindtickle data with sales results, and onboarding and engaging new hires quickly and effectively while maintaining efficiency levels. Unum is also focused on preparing reps for new changes and disruptions in the broker market, leveraging Mindtickle for client services initiatives, measuring elements of Unum's brand promise in the field, and connecting training with gaps identified in recruitment assessments. Overall, Unum is continuing to reimagine how sales enablement curriculum is delivered.

• **Partnering with Mindtickle has empowered Unum to increase agent engagement and development satisfaction.**



## UNUM SNAPSHOT

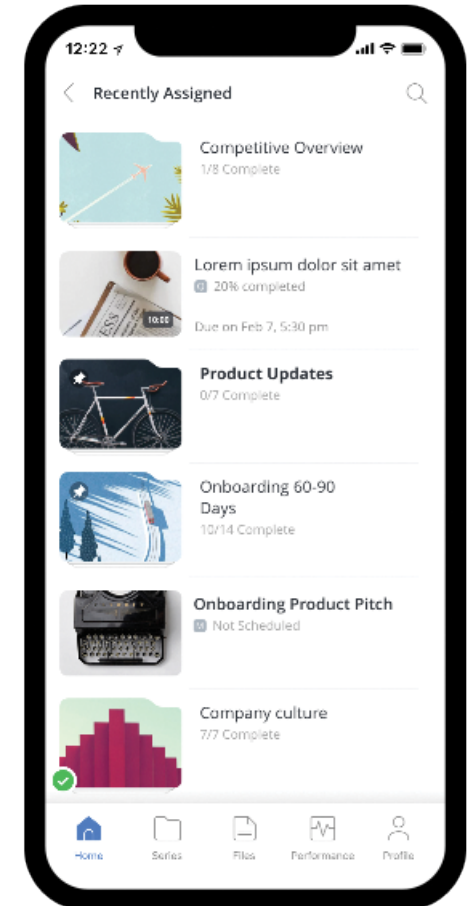
- \* Provides access to disability, life, accident, critical illness, dental and vision benefits through workplaces
- \* Services over 177,000 workplaces in the US and UK
- \* Protects over 38 million people and their families worldwide with almost \$7.2 billion in benefits paid each year

# Transforming engagement

Unum has multiple customer journeys and wants to transform how they interact with their customers to improve the experience. From the design of its programs to the type of content they include, Mindtickle is ready to help Unum achieve their goals.

“ Our leadership is excited about the value that Mindtickle brings to our onboarding and training processes for new hires, especially the data and reporting features that measures and tracks engagement. ”

Lisa Buonocore, Digital Learning Solutions Manager, Unum



mindtickle

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

Get Started