



Horton Group Accelerates Success for New Sales Talent

The Horton Group
Best Sales Onboarding Program
November 2017



Company Background

Insurance / Risk Advisory / Employee Benefits

HORTON

Company At-a-Glance	
Headquarters	Orland Park, IL, USA
Year Founded	1971
Revenue	\$71M
Employees	375
Global Scale	Midwest
Customers/Output, etc.	Insurance broker services offered to mid-sized companies.
Industry	Insurance
Website	www.thehortongroup.com

Budget and Timeframe

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Overall budget	\$100,000
Number of employees involved with the implementation?	4
Number of Operations or Subject Matter Expert employees involved with the implementation?	2
Timeframe to implement	6 Months
Start date of the program	July 25, 2016

Business Conditions & Business Needs

The insurance industry is characterized by an aging workforce that will soon be in a position to retire. One statistic shows that 50% of the current insurance workforce will retire in the next 15 years.

Thus, the #1 challenge facing insurance agents and brokers is attracting and developing talent for the future. Consequently, there is a pervasive need for independently owned insurance brokers to commit to an organic-growth model that fosters new talent and minimizes employee turnover.

At the beginning of 2016, The Horton Group established a training initiative, hired a small training train and branded Horton University to overhaul its approach to training and development of all employees.

Previously, training was largely characterized by apprenticeship and job shadowing. Any formal training required by employees was facilitated through partnerships with external vendors.

The Horton University team quickly began designing a sales training model dubbed the “Journey to Validation” that promotes retention. Key to the projected long-term success of this training program is its inherent sustainability. Instead of investing capital in acquisitions, The Horton Group has committed to a growth model grounded in developing new producers through the robust and revolutionary training program.

This change enables the company to cultivate industry leaders who are highly specialized and well-established in their respective industries. In an effort to retain new talent, the onboarding process for new sales executives, the Journey to Validation “OnRamp,” is highly immersive and aimed at maximum employee engagement.

Upon successful roll-out of the Journey to Validation program in 2016, the team was tasked with creating customizable and pivoting learning plans for the company’s four primary career paths:

- Sales.
- Service.
- Corporate.
- Leadership.

Overview

The Journey to Validation OnRamp begins with a new employee onboarding week attended by service, sales, and corporate resources new hires. Following this week, new sales executives complete a six- to eight-week pre-work period in preparation for Phase 1 of the Journey to Validation program.

Phase 1 is kicked off by a three-week sales combine designed to arm participants with the knowledge and skills necessary to begin phone prospecting with the company. Training within this program is characterized by a blended learning approach involving live, virtual, and micro-learning techniques while offering real-time progress, tracking, and gamification.

Initially, the Horton University team was afforded six months to design and develop the program prior to the start of the first cohort of participants. The primary objectives of the program are:

- Use novel training methodology to onboard new sales executives to the company and ingrain The Horton Group's insight selling model into their daily practice.
- Decrease validation time through burgeoning new business development.
- Enhance the sustainability of The Horton Group's business model.

Based upon these over-arching goals, the Horton University team parsed out a series of detailed objectives that are measurable and have been used to evaluate the effectiveness of the program.

Below these objectives are outlined with a description of how they were achieved.

- Successful launch and implementation of the program in a six-month timeframe.
- Over the course of a six-month period, The Horton University team worked to develop the Journey to Validation OnRamp launched in August of 2016.
- A total of \$250,000 in new business opportunities for senior producers accrued from the calling efforts of the first cohort of Journey to Validation participants in their first three months.
- A graduation rate of 75% from Phase 1 Journey to Validation participants entering Phase 2 of the program.
- 90% of program participants who have participated in the program have graduated through effective training and successful coaching.



- Team-building events organized for program participants by the Horton University team, along with physical changes to the office, (a decompression room and a new-age training space), have helped to establish a culture of learning at The Horton Group's Chicago office. Training, focusing on creating awareness about all aspects of the business, has helped to bridge the gap between sales and service teams and there is mutual understanding and respect among all employees.
- At a company that previously did not have a Learning & Development team, a formal training initiative has been established.
- To roll-out the Journey to Validation program effectively, the company invested in an LCMS, Litmos, to house and track any training opportunities offered to company employees. Horton's branded platform was launched to the sales team in August of 2016 and company-wide in December. Since this time, a total of over 400 custom-made or co-branded courses have been populated on Horton University.
- Online, hybrid, and live training have been designed to appeal to a generationally-diverse workforce.
- Content populated on Horton University is learner-centered and adaptive through gamification, micro-learning, and multimodal training materials and formats.
- New employees are familiarized with company standards and an overview of company processes.
- Surveys from new employees prove that onboarding participants feel well prepared to begin on-the-job training following exposure to the business during onboarding week.

Design and Delivery of the Program

The Journey to Validation OnRamp is implemented in quarterly cohorts, typically consisting of six to eight participants. Throughout the program, participants complete all live training and synchronous webinars as a team and collaborate asynchronously in fully-online courses. These individuals are assigned to learning plans based upon their lines of business.

All live training sessions are facilitated by members of the four-person University team or subject matter experts who have been coached on proper training techniques. These



training sessions are highly interactive and focused on cooperative learning to promote maximum engagement.

Fully online training is all tracked through the Horton University platform. All sales and systems training is created in-house and involves any combination of the following delivery methods: Click-through modules created using Adobe Captivate, tutorial videos created using screen-casting and video animation software, recorded webinars, and informational pages. Reinforcement and knowledge checks for these courses are achieved through learner assignment uploads, surveys, online assessments, and checklists.

Online courses designed to reinforce the insurance technical knowledge of program participants are provided in partnership with external vendors. These online courses are available through Horton University. Content has been provided by The Institutes Risk & Insurance Knowledge Group, The National Alliance for Insurance Education & Research, and The International Foundation of Employee Benefit Plans.

Many of the courses within the Journey to Validation OnRamp are hybrid and involve both online and live learning components. Using a blended learning approach allows courses to appeal to and engage all learning styles.

Throughout the Journey to Validation program, participants are coached by sales and practice group leaders with extensive expertise and industry knowledge. Tenured sales executives also have been thoughtfully woven into the program to serve as mentors and guide rookies toward industry leadership.

When new sales executives are hired at The Horton Group, they spend their first week at the company participating in onboarding week. Throughout the onboarding experience, all new employees complete four days of live training sessions to help them better understand The Horton Group and how to be successful at the company. This live training sequence takes place at Horton's Chicago office, the hub for Horton University.

On the fifth day of onboarding week, participants return to their home offices to work through a series of online training modules that brief them on the following topics:

- Introduction to the LCMS.
- HR Logistics.
- HR Compliance.
- Privacy Training.



- Accounting – Concur Solutions.
- IT Systems.
- Benefits Overview.

The first component of the program is a Welcome and Pre-Work phase in which participants engage in an assortment of preliminary work that provides them with foundational skills to ensure their preparedness for Phase 1.

The majority of the coursework within the pre-work period is online training completed on Horton University's LCMS. Additional pre-work involves shadowing and interview experiences with key members of the sales and service teams. As such, learners are able to participate in this phase of the program at their home offices.

Upon completion of the pre-work period, learners enter Phase 1 of the program. This Chicago-based part of the journey immerses participants in a rigorous training schedule during which they develop the base skills needed to become successful producers.

At the beginning of Phase 1, Horton's rookie producers participate in a three-week Sales Combine that arms them with the knowledge and skills necessary to begin their phone prospecting experience and cultivates a sense of camaraderie within the cohort. Next, learners enter the New Business Development Center and begin phone prospecting on designated campaigns for senior producers at the company. Each day, learners also participate in one- to two-hour training sessions to further develop their skills.

Engagement

The Journey to Validation program primarily recruits from a pool of highly talented millennials. To best appeal to and engage these learners, the team gamified all phases of the program and designed the program to be very interactive to foster intrinsic motivation.

Onboarding week is kicked off by a special teambuilding activity called the "TED Challenge." In this challenge, participants are split into teams and sent to two separate staged offices that are set up to look like the office of the company's CEO, Glenn Horton.

A briefing video is played at the beginning of the challenge to alert the teams that Glenn has been "kidnapped" and taken to a secret location. The teams must use the clues within their office to search for and locate Glenn within a two-hour timeframe or the company will lose one million dollars in ransom money.



The goal of this activity is for the participants to find Glenn within the specified timeframe and beat the team in the other room to the punch. A member of the Horton University team is assigned as the dedicated field agent in each office to help guide this process.

Cameras are placed in each office and the footage is reviewed in real time by the rest of the Horton University team. Clips are pulled from the videos and used in the 30-minute debrief that teams participate in following their search for Glenn. The debrief focuses on exposing strengths and weaknesses in the teams' strategies, while emphasizing the importance of the company's core values: 1) Being Together, 2) Being Excellent, and 3) Being Driven.

Throughout the remainder of onboarding week, participants are exposed to a plethora of executive speakers presenting on the company's lines of business and services. Additionally, there are a series of panel sessions with key individuals on the sales and service ends of the business. These individuals are of varying experience levels with the company to provide new hires with context as they prepare to enter their roles. An executive board speed-dating session at the end of the week gives new hires the opportunity to interact with and ask questions of the top executives at the company.

At the end of onboarding week, learners begin the pre-work phase of the Journey to Validation. Online training within this phase is primarily structured as micro-learning to engage millennial participants.

At the completion of online training, learners' performances are ranked against other cohort members on a leaderboard in the LCMS. They are continually encouraged to reach the top of the leaderboard, and progress is discussed in pre-work learning calls that serve as checkpoints throughout the pre-work period.

Participants also are required to complete interview and shadowing experiences with tenured company employees during this time. This process helps them to further engage with staff and provides context for the online coursework.

Phase 1 begins with a three-week sales combine. Foundation Week is the first component of this three-week sequence. Throughout Foundation Week, trainees are saturated with a colorful series of trainings, guest speakers, and workshops. These experiences are designed to communicate why The Horton Group is an industry leader and the intricacies that make the company unique and competitive.

Foundation Week exposes new employees to all sides of the business and helps them establish connections and interface with key individuals at the company. The week begins



with a scavenger hunt around the city that helps build relationships within the cohort itself and challenges participants to be at their highest level of performance.

Immediately following Foundation Week, learners participate in a week of line-of-business-specific insurance training led by strategic carrier/vendor partners. Namely, Horton partners with Amerisure Insurance to provide risk management new hires with a comprehensive overview of property and casualty insurance, and with the International Foundation for employee benefits training.

The finale of the combine is a sales-specific training week designed to ingrain the Horton-insight selling model into the practice of the rookie producers and help them strengthen their phone prospecting skills.

Throughout the course of Sales Week, participants master the steps to making a successful smart call and learn how to circumvent common barriers. Upon completion of this training sequence, learners are well-versed in how to communicate the value that Horton offers to prospects. Interactive role plays and listening labs enable participants to practice the skills they are learning in a scaffolded setting. This training experience culminates in a round-robin, smart-calling competition judged by senior producers at the company.

Although the majority of the Sales Combine coursework is completed during face-to-face training sessions, learners are required to post answers to daily takeaway questions in the LCMS. The questions seek to help learners be metacognitive about their training experience and provide the Horton University team with meaningful feedback that will yield necessary revisions to the program.

After the sales combine, participants begin their phone-prospecting experience in the New Business Development Center. Each day within Phase 1 begins with an inspirational email and a morning kick-off meeting with the New Business Development Sales Leader. Learners also benefit from weekly one-on-one meetings to discuss their prospecting progress and bi-weekly meetings with senior sales executives leading the campaigns that they are dialing for. The cohort also attends monthly group-call coaching sessions when difficult calls and potential solutions are discussed. At the end of each day in the calling center, participants complete the daily-journal questions online to help them reflect upon their performance. In addition to meeting prescribed dialing metrics, learners attend daily trainings to further develop their prospecting skills and business acumen.

Phase 1 is highly gamified so that participants are excited to begin each day and motivated to excel. A marble system has been established in which members of the Horton



University team can gift or take away marbles from participants depending upon call performance. Participants also can do this with their peers if they notice effective or ineffective prospecting behaviors. This award system motivates learners to consistently practice good habits.

If energy in the New Business Development Center is low, the University team rolls a numbered die to determine the number of calls that must be made by each participant within that hour. Callers also have the freedom to roll the die personally to set a goal for themselves and/or their peers.

Phase 1 participants also are encouraged to take breaks in the office decompression room that has arcade games, foosball, pop-a-shot, Nintendo 64, and a Wii set-up. While encouraging healthy competition, the room also serves to calm anxiety built up during a difficult day of calling.

Monthly team events are set up by the Horton University team to build relationships within the cohort. All of the events have an element of competition to them. Past events include paintball, bowling, escape rooms, whirly ball, laser tag, and volunteering with Feed My Starving Children.

Other competitive elements of Phase 1 involve a dynamic Salesforce leaderboard displayed on a large monitor in the New Business Development Center. It can be viewed by program participants and curious Chicago office employees. Pictures of participants with the highest dial- and-appointment numbers also are posted in the New Business Development Center to encourage future record setting.

At the finale of Phase 1, an MVP for the cohort is named based upon cumulative performance throughout the Journey to Validation OnRamp. This individual is gifted a custom bobble-head of his or her likeness to commemorate the achievement and an identical bobble-head is placed in the New Business Development Center to memorialize the MVP's high performance.

Measurable Benefits

Internally, the successful roll-out of the Journey to Validation OnRamp has paved the way for other large-scale training programs at the company. Current initiatives involve the build-out of a service training model and continuing education related to leadership skills. Horton University also has become the go-to team to help address a plethora of company-wide projects, including defining sales and service processes from the top down and implementing a well-structured and transparent performance-review system.



Horton University's success also has been shared with the Assurex Global network, the world's largest privately-held commercial insurance, risk management and employee benefits brokerage group. It is anticipated that members of the Assurex network will solicit Horton University expertise for consultative purposes in the upcoming months as it is the only program of its kind in the insurance industry. Qualitatively speaking, this success has helped to strengthen relationships between The Horton Group and other independent insurance brokers of its size.

Since the inception of the program, the Horton University and New Business Development teams have used Salesforce to track revenue dollars and potential pipeline opportunities for program participants. Comparing the metrics of program participants to employees of similar experience levels who did not participate in the Journey to Validation indicate how effective the program has been, given the scope of The Horton Group's services. Considering these metrics, The Journey to Validation program has undoubtedly had a transformative effect on the sustainability of The Horton Group's business model and competitive advantage within the insurance industry.

In the first three months with the company, each program participant has averaged more than \$75,000 in potential revenue dollars for the agency while setting appointments for senior sales executives in the New Business Development Center. Pipeline opportunities established from the calling efforts of 10 participants amount to \$768,000.

After completing Phase 1 of the program in the New Business Development Center, the first cohort of participants has transitioned to building their own books of business under the guidance of a sales leader. Potential revenue for the six participants after three months of calling on their own business totals more than \$500,000. This figure is double the revenue typically in the pipeline in this time for a rookie producer who has not participated in the training program.

The Journey to Validation program gained global recognition at the 2017 Stevie Awards for Sales & Customer Service by receiving gold as the Sales Training or Coaching Program of the Year. Also notable were Horton University's sales combine, which was awarded a bronze recognition as Sales Training Product of the year, and Director of Training & Development Jay Fortuna's bronze recognition as Sales Training or Education Leader of the Year.

Additionally, Jay Fortuna has been named one of Human Capital Media's 2017 Workforce Game Changers. This award recognizes 25 young professionals under the age of 40 each year who are making their mark on the HR profession.

Overall

Throughout the process of creating and launching the Journey to Validation OnRamp, the Horton University team and executive leaders were consistently looking for opportunities for growth and continuous improvement while committing to ongoing assessment of the program's effectiveness.

Reviews of performance metrics and internal processes defined through the program revealed that the Journey to Validation OnRamp created additional pipeline opportunities for senior sales people in the company and motivated them to serve as mentors for the next generation of sales executives.

Given the fact that independent brokers like The Horton Group are facing an onslaught of retiring employees, the Journey to Validation program has allowed company leaders to establish a successful and sustainable organic-growth model that incentivizes other companies in the mergers and acquisitions process.

Additionally, they discovered that the Journey to Validation OnRamp accelerates the rate at which rookie producers approach the performance level of tenured producers and close business.

In the review process, the University team also wanted to identify program shortcomings to improve upon the experience for future cohorts. Notably, the team found that program participants retained information from training sessions and were able to transfer their knowledge in novel situations significantly better than company employees have in the past. This change is largely due to the blending learning approach coupled with reinforcement methods and consistent coaching. Because this model has been so successful for the company's sales executives, the Horton University team has started creating similar models for the service and leadership career paths.

The team learned valuable lessons about timing and implementation. Namely, future large-scale training initiatives will employ a top-down approach to ensure that company leaders are accountable for monitoring and motivating their employees to progress successfully through their learning plans. Unfortunately, during the roll-out of the Journey to Validation OnRamp, sales leaders were ill-informed about the program and therefore unable to hold people accountable and further reinforce what was taught.

To solve the issue, meetings and coaching sessions are being held with managers and leaders to get full buy-in and equip them with gap reports and performance metrics for



2017 Excellence Awards Case Study The Horton Group



their employees. The result has been nothing short of transformational, increasing course completion and garnering understanding and buy-in from all levels of the organization.



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