



Horton Group Overhauls L&D to Promote Retention

The Horton Group
Best Program for Sales Training and Performance
November 2017



Company Background

Insurance / Risk Advisory / Employee Benefits

HORTON

Company At-a-Glance	
Headquarters	Orland Park, IL, USA
Year Founded	1971
Revenue	\$71,000,000
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 within 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 four-member training team, 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.

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

Overview

Journey to Validation offers four stages of learning that provide new sales executives with the knowledge base and leadership skills to successfully progress from their first day in the program to ultimate validation in 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 the 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.

The objectives are outlined below in list form with a description of how they were achieved.

- Successful launch and implementation of the program in a six-month timeframe.
- Over a six-month period, The Horton University team developed the Journey to Validation sales training program and launched it in August 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.
- Improve the culture of The Horton Group's Chicago office.
- Team-building events organized for program participants by the Horton University team and physical changes to the office (a decompression room and a new-age training space) have helped establish a culture of learning at the Chicago office. Training, focusing on creating awareness about all aspects of the business, has helped bridge the gap between sales and service teams, and there is mutual understanding and respect among all employees.
- Establish a formal training initiative at a company that previously did not have a learning and development team.
- 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 2016. The platform has more than custom-made or co-branded courses have been on Horton University.

- Design online, hybrid, and live training that appeals 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.

Design of the Program

The first component of the Journey to Validation program is a welcome and pre-work phase. 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 pre-work is online training but also offers shadowing and interview experiences with key members of the sales and service teams. Learners are able to participate in this phase of the program at their home offices.

After completing the pre-work, learners enter Phase 1 of the program. This Chicago-based part of the journey immerses participants in a rigorous training schedule designed to help them 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.

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

Gamification within Phase 1 involves the following: a salesforce leaderboard, smart calling competitions, awards for the best performing producers-in-training, competitive monthly outings, and a decompression room with games to encourage competition during breaks.

In Phase 2 of the Journey to Validation, learners return to their home offices to refine the skills they learned and get a first-hand look at small-business practice and different lines



of business. Progress is monitored and extensive coaching is provided by the Small Business Unit Sales Group Leader.

Rookie producers who graduate from Phase 2 of the program by passing a mid-term evaluation, final exam, and comprehensive performance reviews will move on to Phase 3. Within this final stage, each participant is further prepped for validation by joining a practice group and gaining experience under the guidance of a Sales Leader. After mastering key skills and validating with The Horton Group, participants complete Level 3 sales training.

Delivery of the Program

The Journey to Validation program is implemented in quarterly cohorts typically consisting of 6-8 participants. Throughout the program, participants complete all live trainings and synchronous webinars as a team and collaborate asynchronously in online courses as well. Participants are assigned to learning plans based upon their lines of business.

All live training sessions are facilitated by members of the Horton University team or subject matter experts who have been coached on training techniques. The sessions are highly interactive and focused on cooperative learning to promote maximum engagement.

Fully-online training is tracked through the Horton University platform. All sales and systems training is created in-house and involves a combination of the following delivery methods: click-through modules created using Adobe Captivate, tutorial videos created using screencasting and video-animation software, recorded webinars, and informational resources. For reinforcement and knowledge checks, learners upload assignments, surveys, online assessments, and checklists.

Online courses are designed to reinforce insurance-technical knowledge of participants and are provided in partnership with external vendors such as The Institutes Risk & Insurance Knowledge Group and the International Foundation of Employee Benefit Plans.

Many of the courses within the Journey to Validation are hybrid and involve both online and live-learning components. Such a blended learning approach makes it possible to appeal to all learning styles.

Throughout the program, participants are coached by sales- and practice-group leaders with extensive expertise and industry knowledge. Tenured sales executives serve as mentors and guide the rookies toward industry leadership.

Measurable Benefits

Internally, the Journey to Validation has paved the way for other large-scale training programs at the company. Current initiatives involve building 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 both sales and service processes from the top down and implementing a well-structured and transparent performance-review system.

Horton University's success 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 in the upcoming months. Qualitatively speaking, this relationship has helped to strengthen relationships between The Horton Group and other independent insurance brokers similar in 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 the effectiveness of the program. Considering those 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 period 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 was Horton University's sales combine, which was awarded bronze recognition as Sales Training Product of the Year. Director of Training & Development Jay Fortuna earned bronze recognition as Sales Training or Education Leader of the Year. He also has been named one of Human Capital Media's 2017 Workforce Game Changers, which recognizes 25 young professionals under the age of 40 each year.

Overall

Throughout the process of creating and launching the Journey to Validation program, the Horton University team and executive leaders looked consistently 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 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 sustainable, organic-growth model. Additionally, they discovered that the program accelerates the rate at which rookie producers approach the performance level of tenured producers.

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, 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 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.



About Brandon Hall Group

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