

DO YOU SEE A PATTERN HERE?

Insurance Sales and Agency Managers Face the Timeless Reality of Their Training Challenges

By Frank Sarr

14 Years Ago

I asked a group of sales/agency managers from a major insurance company what were the issues they faced in performing their training responsibilities. We then listed on the flip chart the following issues:

- Scheduling training
- Monitoring training results
- Coordinating all available training materials into a coherent program
- Maintaining consistency (often due to remote locations)
- The time intensiveness of classroom training
- The on-going assessment of training skills and programs
- The cost of training

Recently

I recently asked a group of sales/agency managers from another major insurance company what issues they faced in performing their training responsibilities. We listed on a flip chart the following issues:

- Time commitment/their time
- Consistency of training
- Competency development
- Measurement of results
- Representative accountability
- Lack of focus/too many hats
- Balance – Fast Start versus Professional Student

Do you see a pattern in these answers? Are you surprised with these answers?

I suspect that you did see the pattern. And you were not surprised. This is and has been the “**reality**” in which training is delivered and has to be dealt with if training is to be delivered successfully. This leads to the next question. What do you think the answers will be if another group of sales/agency managers five years from now are asked the same question? I suspect that the answers may not be much different as long as the root causes of these issues are not addressed. What are some of the root causes?

Pre-Occupied Trainers

The first root cause is the role that a sales manager or agency manager has to perform. This role forces them to be what I call “pre-occupied trainers.” In addition to the tasks of recruiting and selecting salespeople, they are also expected to meet their sales quotas (monthly and annually),

support their agents in the achievement of their goals, do joint work, track the processing of business, and put out the daily brushfire – whether agent, office or client driven. Where’s the time to commit to addressing the issues that they said get in their way of training? When the daily priorities are identified, training may be at the top at the beginning of the day but can drop quickly as more pressing priorities force their way to the top of the list.

The Need for Structure

Another root cause is the need for structure to deliver the training. Many years ago when I was a training director, I felt my agencies viewed themselves as islands who emphatically told me that they didn’t need any help but in fact they were desperate for the right help. They had training that had very little structure supporting it because they didn’t have time to build a structure on their own. I have been told that it is tough to get managers to buy into training solutions that a home office develops. First of all, if the solutions did address the issues listed above, I can assure you that the managers would eagerly embrace the solutions. Secondly, many of the solutions delivered only compound these issues by piling on more resources instead of being a solution. They become another obstacle for a manager because the solutions are not sensitive to the “**reality**” in which managers operate.

What Do You Need To Deliver to your Sales Manager?

Learner Driven/Reality – The pressure for learning must be on the learner and not the manager. Therefore, anything that is delivered should focus on the learner taking the initiative to prepare themselves to perform and demonstrate what they are required to know. This does not mean that the learning is self-directed because has been proven to be equally ineffective. What this means is that the learners are expected to demonstrate what they learned and that the demonstration does actually occur on a systematic, visible basis.

A Process, Not an Event – Once all the resources for the learner are organized into a linear learning experience, it needs to be used the same way with each new group that goes through the same training. What you want to deliver is a process that assures there will be long-term, consistent training outcomes. If it is an only an event, it will be another issue that impacts the managers’ ability to deliver the training effectively and/or even use what is being provided.

A Platform – What is delivered will be modified by the manager so it must be flexible enough that the learning can be delivered in a manner that addresses the “**reality**” in which the agency operates while not diminishing the ultimate learning objectives and performance of their learners. The chassis of the training should be the same and each manager can adapt the exterior to suit their needs.

Accountability – Whatever the structure, it must incorporate accountability measures necessary to get both the “pre-occupied trainer” and the “learner” to do what is required to achieve the desired results. Without accountability, five years from now there is no doubt we will be listing the same issues on a flipchart.

What is being described here is easily achievable and has been done with outstanding results. The keys to making it work, besides what we just described, are:

1. The shift from the sales manager delivering the training to the learner taking on demonstrable responsibility for the learning.
2. The need to understand the reality under which the sales manager works and addressing those needs in the delivery mechanism.

The “Reality Test” – I was once told that it doesn’t matter how good the dog food is, if the dogs don’t eat the food. Whatever is developed for field implementation should be implemented by the developer personally, hands-on, to see if and how it works in the real world. It means putting yourself in the position to fail. On the other hand, if the program is successful because of your active involvement in the field testing, you can build support through personal testimony and the input of those who participated. These people will become your centers of influence to vouch for its success.

If you want to understand the reality in which your managers work, walk in their shoes for awhile. It will give you credibility, a proven solution to “sell,” and centers of influence to help you implement your solution throughout the organization.

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