

**Concord Group Insurance: Turning to the Web***September 06, 2007*

By Jonathan Leer

Several years ago, Concord Group Insurance realized the Internet would bring significant changes to the insurance industry, and started to modify its infrastructure and processes accordingly.

Founded in 1928, Concord Group Insurance (Concord Group) is one of the largest writers of personal and commercial insurance in Northern New England, serving customers through a network of more than 300 independent agents located across New England.

From a marketing standpoint, the plan to migrate its IT department from supporting policies on longstanding mainframe computers to Web-based systems was a home run. Competitors already were advertising on television about consumers being able to buy insurance online. But how to promote this and provide the necessary support to its independent agents was another issue. Three years ago, Concord Group decided to bring in training consultant Tim Ross of Trainingwell to train its independent agents and in-house marketing team (Concord Group has no in-house training department, while Trainingwell has three in-house trainers, with access to more than 45 independent trainers).

The goal was to introduce the agents to using Concord's Web-based portal for real-time transactions with an interactive user interface. However, this presented a huge change to the established agents who were accustomed for years to logging directly into the company mainframe to manage their business. "We didn't want training to interrupt the current book of business," says Ross. "So we had to maintain two systems throughout the integration process. By leveraging the relationships in senior management between IT, marketing, and underwriting, we were able to minimize the disruption to the business throughout the learning curve. Concord agents have benefited from this project and now have access to one of the leading tools in the insurance marketplace."

Concord Group's network of sales agents needed training on Concord's particular technology offerings, information distribution, and sales management. "Our goal was to develop just-in-time training to support Concord Group's custom applications without wasting the sales agent's time, and we wanted to leverage available media to deliver an accurate, consistent message in a timely manner," Ross says.

In response, Ross designed a training plan that was personalized, yet customized; delivered in all media (classroom, Webinar, self-paced e-learning, and print); was searchable in bite-sized chunks to improve retention; and was measurable for repeated success.

Ross says increasing end-user performance continues to be the No. 1 priority. As a result, whenever Concord has a corporate event or distributes printed sales materials, the company incorporates small training tips into the mix. Thus, training is ongoing, without disrupting the business at hand. "In a traditional training class, 80 percent of the content will be forgotten in just 10 days," Ross says. "But if we produce several training tips and deliver them throughout different channels, the retention level grows exponentially."

With the insurance business continuing to undergo dramatic change since Trainingwell started the training program, Concord Group has tweaked its training methods. The company has been successful with shorter venues that compliment one another, such as:

- Forty-five-minute, personalized Webinar with the VP of marketing to explain concept and benefit.
- Two-hour showcase to demonstrate a live application, including: 30-minute marketing, 30-minute hands-on lab, 30-minute Q&A, 30-minute lunch/networking. Printed material is kept to a minimum, with news updates offered via "Agentgrams" on the company portal.
- 90-second, Flash-based simulations and printable reference cards hosted on the secure portal.

This model has been cost-effective in reaching a large audience without negatively impacting business, Ross says. "We continue to focus on offering useful information to agents to help them be more productive, while limiting the time and effort to get up to speed on the new technology and services."

How does Concord Group measure training success? "For training on this particular Web application, we measured an increase in the amount of business that was written by our agent base over the next two quarters following the campaigns," Ross says.

A less likely and subtler measure of a training aid's success is how long it takes up real estate on an employee's desk. Ross worked with Concord's marketing group to develop an old-fashioned, simple flip-card for the rep's desk, with sales information on one side, and training tips on the other.

If he had unlimited funding for training, Ross says his wish list would include: "Flash video, a dedicated training facility, and a personal chef—because in the end," he jokes, "no matter how good the training was, it all boils down to the quality of the food served for lunch."



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