



# Blended learning program boosts sales at Aon



**AON**

CASE STUDY AON



**FACULTY  
OF SKILLS**

## Sales skills in service-oriented environment

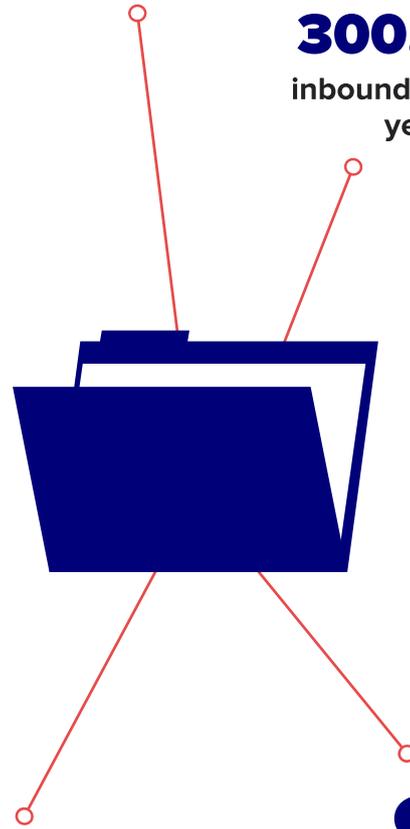
### A truly blended learning program

An excellent customer experience and outstanding service is paramount at Aon. Customers must be properly assisted with a product that suits them. And sometimes this means offering a new, more extensive or supplementary insurance. In this way, selling a product is an expression of that good service.

For the consultants in the customer service department and their team leaders, the Faculty of Skills has developed a broad and attractive blended learning program to improve sales skills. In this case study you can read more about the design of the program and the experience of the participants.

**7**  
different locations

**300.000**  
inbound calls per year



**118**

trained advisors

**9**

trained team leaders

## About Aon

Aon Affinity offers businesses, trade associations, franchise organisations and branch organisations, associations customised insurance packages. Consumers who take out this type of insurance package can contact the Aon Customer Service department with any questions or issues they may have.

## Seizing opportunities

The advisers working at Aon's customer service were already experienced and good at their job. They know the products like the back of their hand and that knowledge enabled them to answer customers' questions flawlessly. But the idea of proposing a new or additional insurance policy to a customer often didn't occur to them. The consultants just didn't think about it, or found it exciting to turn the conversation around and offer a commercial product. This resulted in missed sales opportunities and major inconsistencies among the advisers. The employees who did find it easy to have a commercial conversation, and also enjoyed it, sold far more extra insurance products than their colleagues. Aon wanted to tackle these challenges. Faculty of Skills developed a blended learning program for the group of advisers and their team leaders.

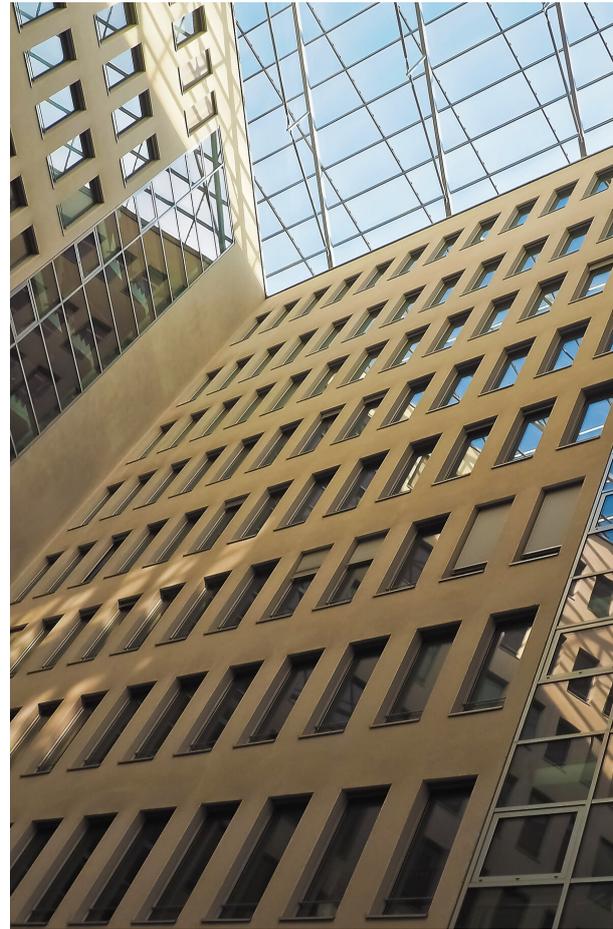
These were the starting points:

- A fun and attractive learning program
- Live-moments in which they offered real added value
- Online training and coaching: quick, efficient and scalable

## Specific objectives

The target group consisted of two job profiles: advisers and their team leaders. Separate goals have been set for each position.

- Advisers: get advisers into a learning mode and provide the sales skills that are important to them and the company. Help advisers transfer their new skills to their daily work
- Team leaders: get the team leaders enthusiastic and enable them to coach their people at work.



## Advisers

Together with Aon we started with the basics: the job title for this group of employees. They used to work as Customer Service employees, but from now on they will be called advisers. More cachet and immediately a different feel to the role these individuals carry out. The core of the adviser learning program consisted of a sales training, with a live meeting and a two-week online course in TrainTool. We expanded the adviser's repertoire with sales skills and worked on the necessary self-confidence to put these skills into practice.

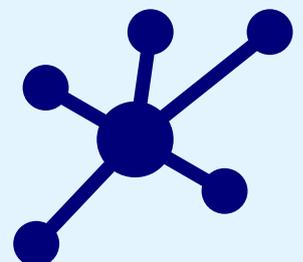
In order to learn how to conduct good sales conversations, the participants were introduced to the GOAL method:

- Get connected
- Obtain information
- Advise the customer
- Lead to a choice

## Team leaders

The team leaders play an important role. They know the team well and ensure that the objectives are being met. In order to properly coordinate the implementation in the workplace, it's important that the team leaders fully understand the program. Both in terms of the content, so they can coach the employees in their role, as well as the underlying concept. The team leaders have also acquainted themselves with the RAAK model, but the rest of the training placed the emphasis on coaching leadership. Team leaders provided the feedback for the online role play tasks carried out by the participants in Trainool. The PEER-model was used to provide suitable feedback in this instance:

- Perception
- Effect
- Enter into discussion
- Resolve

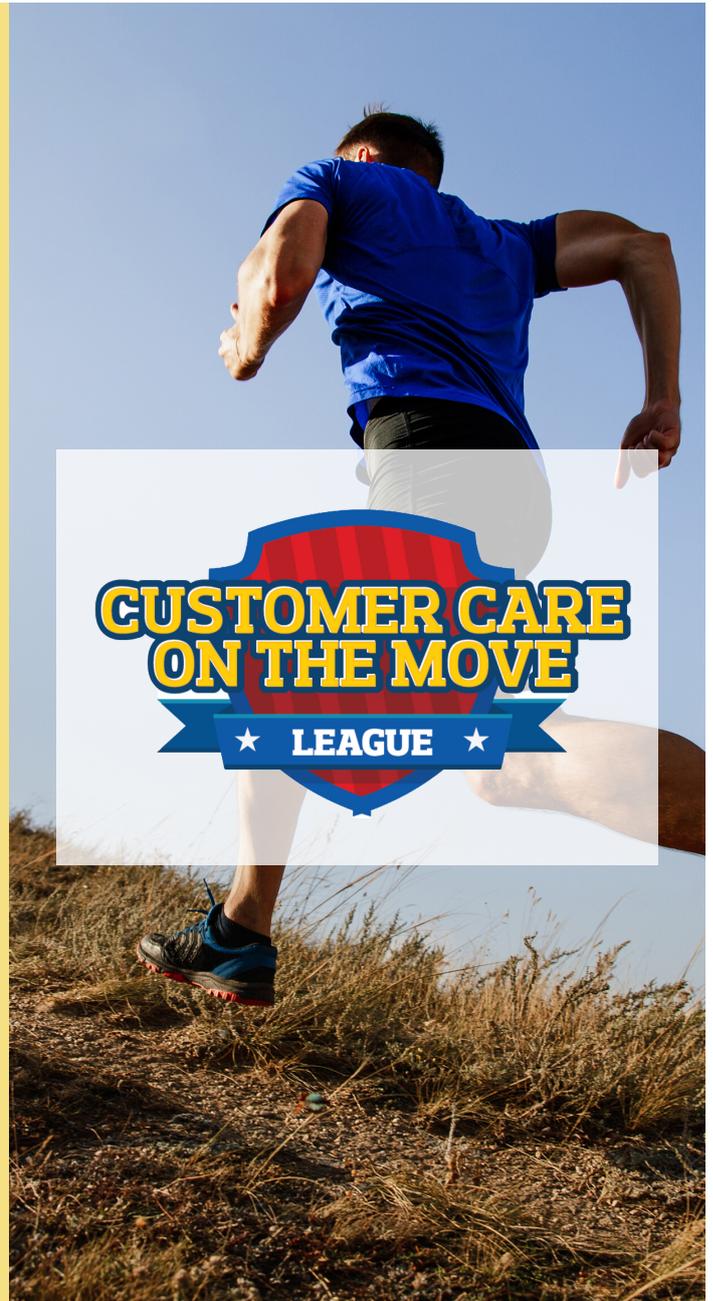


## Keep it fun: Customer advice on the move

The overarching theme throughout this program was passion for sport, exercise and progress. We called the learning program Customer advice on-the-go. A lot of the focus was on making this learning trajectory attractive and fun. All activities and expressions were related to the theme to keep the participants motivated and inspired throughout the entire process.

### Crucial parts of our approach

- Involvement of senior management: The Aon management team aimed to motivate and inspire participants, for example by sharing inspiring videos and always being present at the live meetings the advisers took part in.
- Gamification: the competition between different branches was stimulated using different challenges, for example: design your own team logo and decorate your office in your own style.
- Personal approach: handwritten invitations by team leaders and management.
- Fun: lots of sporting activities and gadgets. Climbing, baseball caps and water bottles.
- Do it together: a large board with the signatures of all participants traveled from location to location to ensure everyone's participation.



## Live role playing and practice online

The program was a truly blended learning trajectory, alternating between online practice and live role playing. This way, the relatively large group of participants, spread across multiple locations, could be trained efficiently within a short period of time. The next page gives a brief impression of the program.

## Team leaders

Teaser: an inspiring and engaging video by Marije Peters, Managing Director Affinity Service & Sales

Live kick-off: with more background info in terms of the core of the program, inspiration and fun. For example, a climbing wall was present at the location so that the team leaders could climb up and symbolically take their teams to the top.

Team Boost: introduction in coaching leadership. How do you coach your employees?

Live workshop: Developing coaching skills. Team leaders work with the results of the intake scan and the mindset workshop. Introduction to the models. Give feedback in TrainTool: how does it work?

Online coaching: team leaders gave feedback on the exercises carried out by their team members in TrainTool.

Live meeting: prepare for the Transfer Day. Set goals and discuss the way of working to continue coaching and to focus on results.

Transfer Day: Team leaders facilitated group discussion and on-the-job coaching. Set goals for the future. Team leaders initiated challenges for their teams.

## Advisers

Teaser: an inspiring and engaging video by Marije Peters, Managing Director Affinity Service & Sales

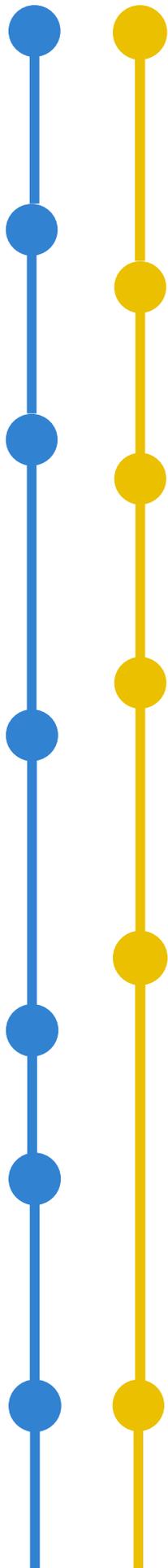
Video and pre-party: inspiring videos and cake for the advisers at all 7 locations. Let's get started!

Online intake skills scan to determine the existing skill set. Expert coaches provided a feedback report. Advisers were able to complete the intake scan during working hours.

Live mindset workshop door een ervaren trainer. Een lid van het management lichtte het belang van het programma toe. In de workshop werd gewerkt aan de team spirit, gedrag en bezwaren ('Onze klanten willen niet dat we ze iets verkopen'). Adviseurs tekenden het handtekeningenbord.

2-week online training course in TrainTool: learn new skills with the audio role plays. Exercises in the RAAK mode. Advisers were facilitated to allow them to practice at work. They asked questions and provided peer feedback to each other. Team leaders provided their feedback on the exercises in TrainTool.

Transfer Day: Team leaders facilitated group discussion and on-the-job coaching. Advisers took part in the challenges such as designing a logo for their team.

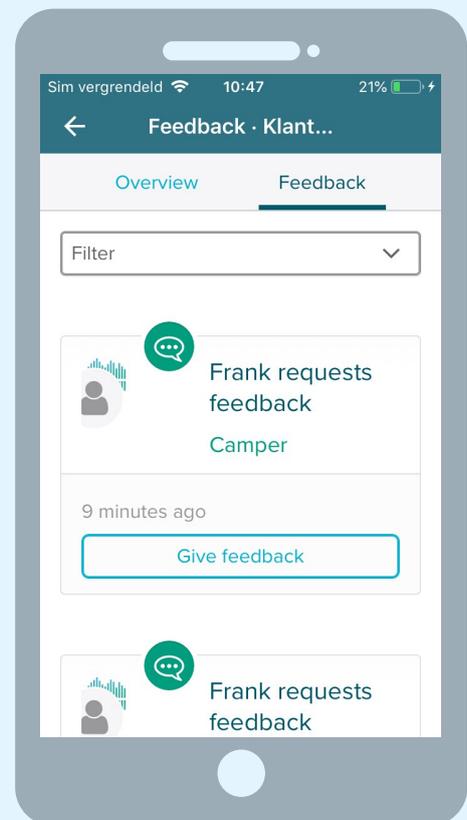


## Using TrainTool

An important part of this training program was the use of the TrainTool software, developed by the Faculty of Skills. The advisers met TrainTool twice in the program:

- Online intake sales scan: advisers took part in an intake in TrainTool. They demonstrated their sales skills in a series of eight audio role plays. They could participate from a computer with a webcam or a smartphone. After a brief introduction, the participants got a fictional customer on the phone. They were asked to talk to the customer as they would normally do. The answers were recorded. Participants were given the opportunity to repeat the recording once. The final admission was sent to a Faculty of Skills coach, who sent the participants a written feedback report. A summary of the results of the team was also sent to the team leaders.

Online training bootcamp: After a workshop in which the results of the scan were discussed, the consultants started the training in TrainTool. 16 audio role plays were available and the participants were able to record themselves again. To practice they could now re-record as often as they wanted. It was also possible to ask colleagues for feedback. Finally, the recordings were sent to the team leader, who gave feedback to the employees.



**See how TrainTool works?**

Scan de code or go directly to [www.faculty.nl/en/traintool-app/](http://www.faculty.nl/en/traintool-app/)



## Practice, practice, practice

The online scan gave advisers insight into their current options. Armed with this knowledge they went into the workshop with the right mentality. The results of the online scan were also valuable for the team leaders. Because everyone did the same scan in a short space of time, with a wide range of examples, the team leaders knew immediately at team level where there would be room for improvement.

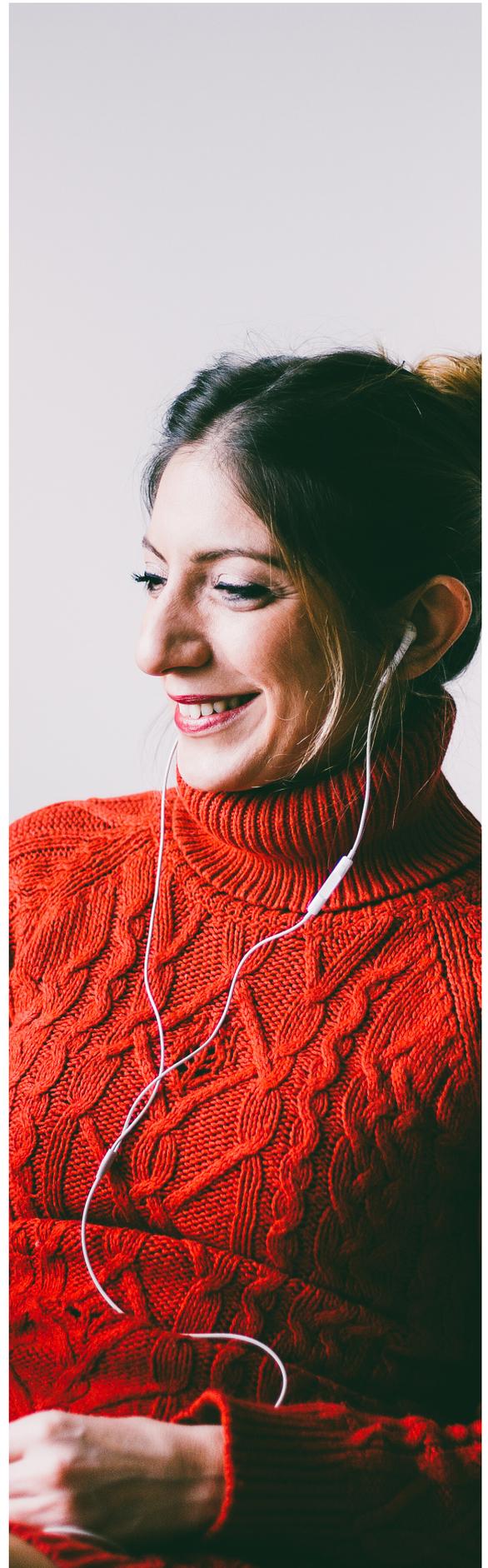
The advisers have been able to practice through 16 different role plays. On average, advisers practiced role-playing 3.2 times, so in total they practiced about 50 times per person. Something you can only dream of during a live workshop!

The project also included a lot of personal coaching: participants received feedback from an independent coach on the online scan. Buddy groups were formed during live meetings to help each other. Peer feedback was given and received 513 times in TrainTool. By training the team leaders in coaching techniques, continuity in the workplace is guaranteed.

The team leaders ensure that the subject remains top of mind, continue to inspire (new) team members and make sure that the goals are achieved.

## Easy to scale up

An important advantage of online training is the scalability and therefore the international potential of the project. Aon is a global player with more than 600 offices in 120 countries. Online training and assessment contribute to a consistent level of skills. The majority of the group trained mostly online, which made the process very efficient. The team leaders are trained more intensively face-to-face, which remains a possibility if the training is rolled out further (internationally). Through this process, a relatively small group of employees can bring about a major change, which is just the start of a worldwide improvement.



## Reviews and results

### Team leaders review

On a scale of 5 stars



Training #1 Teamboost	4.3 stars
Training #2 Get set..	4.4 stars
Training #3 Go!	4.4 stars
Review of the trainer	4.7 stars

Felt ready to take the Transfer Day further	85,7%
Felt ready to coach	100%
Satisfied with the level of variety the program offered	100%
Participation	100%
Has this training changed the way you coach?	Yes 100%/No 0%
Have your coaching skills improved?	Yes 100%/No 0%
Have you received enough tools to coach in the workplace?	Yes 100%/0%
How did you find giving feedback via TrainTool?	4.5 stars
Do you think feedback via TrainTool adds value?	4.6 stars
What do you think of the outcome of the 'Ready to score' workshop?	3.9 stars

Reactions from team leaders



**"Fun and educational training program. Plenty of tools to use in daily practice for the time being."**

**"Great training program! Will definitely recommend."**

**"For this to remain a success, it would be wise to sit down with small groups every quarter."**



## Advisers review

### Intake scan

5 or lower	6 or higher	8 or higher
10%	90%	38%

Average score: 7.1

### Online training

5 or lower	6 or higher	8 or higher
8%	92%	48%

Average score: 7.3

On a scale of 5 stars



Mindset workshop	4.2 stars
Review trainer	4.5 stars
Coaching	4.0 stars

Attitude towards sales has improved	Yes 87%/No 13%
Sales skills improved following program	Yes 73%/No 27%
Team leader continuously coaches you?	Yes 93%/No 7%
Would you like more training?	Yes 48%/No 52%

Reactions from advisers



**"It's fun and educational to hear yourself again. Not only do you hear what you could do differently, but you also get to hear the positives, which is really encouraging."**

**"The GOAL-model allows you to build up a sale step by step. It enables the customer to decide for themselves whether or not to take out in suran ce."**



**"I like the fact that I get the chance to ask questions or to answer a customer. In reality this requires some practice, but I think I picked it up quickly. Thanks for this training!"**

# Want to find out more?

Take a look at the other case studies about customers such as Dutch Railways, Rabobank, KLM, Deloitte and various universities. Read more about our way of working and the possibilities we offer on [www.faculty.nl/en/home](http://www.faculty.nl/en/home)



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