

# Procoach<sup>™</sup> Case Study

Making people better at selling, giving customer service and managing others



## Procoach<sup>™</sup> helps Halifax General Insurance win additional business

### Company Background

As part of the Halifax Group of companies, Halifax General Insurance Services Ltd is a name respected by the general public and within the insurance industry. From their head office in Halifax - and regional offices - they offer a series of award-winning protection policies.

### The Challenge

Halifax wanted to increase their sales effectiveness with each customer by ensuring that current and future customer requirements are known and properly catered for. In contact with the customer, it is important to explore their requirements in three interlinked product areas - offering appropriate solutions for each. At the outset of the project, agents were only dealing with one or two of the products on each customer call. Customer service agents were hesitant when asked to locate and secure additional business for the company in the third area.



**Prosell**

People • Performance • Improvement



## The Solution

Initially, analysis of the prevailing situation was needed. Prosell's analysis included observing service agents at work to assess their individual strengths and weaknesses. It was also vital to establish a practical sales structure and behaviours that would offer a basis for coaching on "best practice".

Initial observations showed that agents were typically good at building rapport with customers and that they demonstrated a high level of empathy. Agents typically found it difficult to look at customer requirements from the customer's perspective - rather than their own. They therefore assessed product prices based on their own experience rather than a customer view.

As a result, the agents' sales approach often lacked conviction and typically evaporated at the first sign of resistance or doubt. Also, despite a good level of shared commitment and team focus, there was scope for assessment and ongoing development of the sales team members by their managers.

## Why Halifax chose Procoach™

Prosell recommended a course of action to improve the situation and meet the longerterm objectives of the organisation. This solution embraced the development needs of the individual, as well as the need to minimise disruption in the workplace.

A programme of coaching sessions was required to achieve the performance standards set, together with the necessary improvement in agent effectiveness. This coaching was developed to cover basic sales and communication skills, as well as the sales structure that would ensure a level of consistency across the team. Training of the Team Leaders in coaching skills was also essential to ensure that the improvement in agent performance, achieved through the training, was sustained in the long term.

## Implementation

A qualified Prosell coach carried out coaching within the agents' workplace, and each agent received around four hours of one-on-one coaching during this phase. Personal coaching plans were devised to support ongoing development. Halifax Team Leaders were also observed, and were encouraged to become involved in the coaching to support their own coaching skills development.

## Results

Two weeks after the training and coaching of the agents, evaluation of the changes in performance was completed. The data captured was broken down into specific behavioural areas. Whilst the initial rapport building remained the same (it had been scored at a relatively high level during the initial analysis) there was very marked improvement in -

- Agent clarification of current arrangements **36% increase**
- Leading with specific product proposal **60% increase**
- Response to customer buying signals **21% increase**
- Summarising and closing for business **30% increase**

### Total Sales by Product – after ProCoach™ Programme

Halifax Product 1	<b>Up by 66%</b>
Halifax Product 2	<b>Up by 69%</b>
Halifax Product 3	<b>Up by 49%</b>

### Key Performance Indicators

Close Rate	<b>Increased by 64%</b>
Average Sales	<b>Increased by 46%</b>
Total Sales	<b>Increased by 35%</b>

To find out more about Procoach™, please contact us on **+61 (0) 2 9906 5755** for Australia and **+ 44 (0) 870 855 3000** for the United Kingdom or visit **www.prosell.com**

**www.prosell.com**

These particulars are believed to be correct but their accuracy cannot be guaranteed and they do not form any part of a contract. Whilst every effort has been made to ensure that any information supplied is correct, this brochure is intended simply as a guide. Any literature provided does not form any part of any sales contract.

