



Securian Financial Group accelerates business processes and improves the speed and quality of learning with WebEx.

Securian Financial Group is one of America's leading providers of financial security for individuals and businesses, providing more than \$430 billion of insurance protection and safeguarding approximately \$24 billion of assets. Securian's wide range of product and service offerings includes insurance policies, retirement plans, financial planning and investment services. This 125-year old company works with an extended network of financial managers, agencies, and firms throughout the US to consistently bring quality products to its customers and maintain its top ratings.



A WebEx customer since 2003, this premier financial services company uses WebEx training applications – Presentation Studio, Training Center, and Meeting Center.

“During the initial roll out [of our \$13 million Client Connect project], we spent six months traveling to train on the system. Now with WebEx, we can do the same in 30 days.”

— Michelle J. Brennan, Professional Development Consultant, Securian Financial Group, Inc.

INDUSTRY

Financial Services

WEBEX APPLICATIONS

Presentation Studio, Training Center, Meeting Center

SUMMARY

Securian Financial Group needed a more effective way to deliver training to a growing number of advisors. Implementing WebEx throughout the enterprise, Securian was able to accelerate its advisor communications and overall business processes using blended training methods. As a result, the organization speeded information delivery and significantly improved the overall quality of learning.

ABOUT SECURIAN FINANCIAL GROUP

Headquarters:

St. Paul, Minnesota

Number of employees:

3,100

Line of business:

Financial Services

Target markets:

Individuals and businesses

WebEx service in use:

On Demand Module™ (formerly known as Presentation Studio), Training Center, Meeting Center

Has been a WebEx customer:

Since 2003

Providing more than \$500 billion of insurance protection and safeguarding approximately \$27 billion of assets, Securian Financial Group has provided financial security to individuals and businesses since 1880. Securian's wide range of product and service offerings includes insurance policies, retirement plans, financial planning and investment services. To consistently provide quality products to its customers and maintain its high financial ratings, this 126-year old company works with an extended network of financial advisors and firms throughout the US.

The Challenge

In 2003, Individual Business Technology, a Securian unit that provides software training to its advisor network, was facing a critical challenge. The number of trainees flying in from around the country had increased by 60 percent while the facilities and equipment required for hands-on training remained steady. Instead of the typical 20, schools of 50 or more new advisors would go to the St. Paul headquarters for three or four business days.

“I had an hour and a half to deliver hands-on training to the people who sell our products, but the space no longer allowed us to provide a really useful, face-to-face interaction,” says Michelle J. Brennan, professional development consultant at Securian.

The Solution

Brennan quickly realized that using training sessions that could be prerecorded and viewed online could better prepare her students before they arrived and would improve the quality of the in-person class time at Securian. While researching several Web presentation solutions, she came across the WebEx Presentation Studio Module and was impressed by its look and ease of use. Using Presentation Studio, Brennan began providing students with

prerecorded online training presentations that included built-in tests to help retain audience attention and determine areas requiring additional training. Students were required to complete the activities before attending in-person training.

“This allowed me to spend face-to-face time addressing students' particular questions. If necessary, I could even assign them follow-up work through Presentation Studio when they returned home,” recalls Brennan.

Even though Brennan was happy with the improvements resulting from using Presentation Studio, she still wanted a live e-learning capability to make the training even more effective and interactive. Suspecting that other Securian divisions were probably facing similar training challenges, she shared her results across the enterprise. Other divisions were impressed with the Presentation Studio capabilities and what WebEx had enabled Brennan to accomplish. Consequently, they partnered with her division to purchase a joint license for WebEx Meeting Center, Event Center, and Training Center. Use of Presentation Studio was then discontinued in favor of these live online training modules.

“WebEx was wonderful in our enterprise roll-out. They hosted specialized online training events on using their applications,” says Brennan. The WebEx Web Meeting Applications were adopted by more than seven divisions at Securian, including corporate law, professional development, policy services and marketing. Some of the divisions even created their own branded WebEx user interface for their own meeting portals, where they collaborate and train on their own schedules and in their own ways. Today, approximately 350 users at Securian host WebEx presentations for their partners and customers.

The Securian Advisor Services unit, where Brennan now works, uses Training Center to deliver 15-20 interactive sales and marketing training programs to financial firms and advisor groups on a monthly basis. They use a variety of Training Center tools such as quizzing and polling, animation and whiteboards to ensure the sessions hold the audience's attention.

"Every three minutes, we make sure students are engaged by raising their hands, drawing on a white board or typing in answers," explains Brennan. Other features, such as breakout sessions and hands-on labs, further enhance the e-learning experience. And Brennan makes recorded sessions available for people who can't attend so they can catch up.

Instant sessions and desktop sharing in Training Center allow financial advisors to call in and receive quick answers to urgent questions.

"An advisor may have a scheduled meeting with a client and come across a glitch in his or her sales materials. We can instantly respond by launching an instant Training Center session. Not only do we solve the problem immediately, but we turn the whole situation into a learning experience," says Brennan.

Brennan's unit also uses Meeting Center for podium-style presentations and broadcast meetings in which new products are announced or strategic information delivered to Securian business partners, vendors and firms. Brennan points out, "When we want to present an investment strategy for a new fund class, for example, Meeting Center helps us keep the participants focused on our message."

WebEx On Demand Module™, formerly known as Presentation Studio, is in use again at Securian throughout the enterprise to supplement live meetings. On Demand

Deploying WebEx Across the Enterprise	
DEPARTMENT	APPLICATION USE
Information Technology	<ul style="list-style-type: none"> • Application rollouts • A 13-million dollar client data management system • WebEx used to deploy several desktop upgrades
Advisor Services	<ul style="list-style-type: none"> • Delivers 15-20 interactive sales and marketing trainings to insurance firms and financial advisor groups on a monthly basis • Trained 65 agencies in 30 days • Easy access to dozens of recorded modules for employees to access on new products, procedures and corporate initiatives • Team meetings and collaboration on projects
Product Management	<ul style="list-style-type: none"> • Product rollouts • Product training • Research and product feedback
Executive Team	<ul style="list-style-type: none"> • All hands and department meetings • Strategic meetings with business partners, vendors and agencies • Legal review of documents
Compliance Training	<ul style="list-style-type: none"> • Ethics training • Risk management • Sarbanes-Oxley
Agent Support	<ul style="list-style-type: none"> • The use of instant session and desktop support enable agents to receive hands-on help to urgent questions • Collaborate on new products and initiatives with subject matter experts
Sales Teams	<ul style="list-style-type: none"> • Team meetings • Looking to leverage WebEx Sales Center to incorporate web selling into their organization

sessions are particularly useful in delivering training on compliance or their new long-term care product, as well as mandatory corporate meetings. According to Brennan, "The On Demand Module™ has the right editing and recording tools to let us deliver polished presentations without the stops

and starts common in live presentations. WebEx supports compliance by telling us who has registered and attended a specific training. We also use viewing times and testing to determine whether an attendee stayed through the presentation and is truly compliant."

"[With WebEx] our customers can now view many training presentations when they're available. No more three-day sessions away from their offices. Delivering information in smaller doses and at the customer's convenience improves retention of the material."

— Michelle J. Brennan, Professional Development Consultant, Securian Financial Group, Inc.

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The Benefits

With WebEx, Securian was able to improve its business processes throughout the enterprise by implementing a whole new approach to collaboration and training. As a result, the organization significantly improved the quality of information distributed to its advisors, partners, and customers while providing more effective methods of delivery. According to Brennan, “WebEx has allowed us to get information to people more quickly than in the past. Plus it allows us to make sure the information delivered is consistent. We used to have multiple teams traveling to deliver information and the messages varied from person to person.”

The impact of WebEx can be clearly seen in Securian’s 13-million-dollar Client Connect system, their client data management system.

“During the initial roll out, we spent six months traveling to train on the system. Now with WebEx, we can do the same in 30 days,” explains Brennan. Her unit is responsible for training personnel at 65 general agencies, and some that handle individual needs such as retirement and insurance.

“In rolling out the new version of the system, we’ve been able to decrease our travel budget significantly because of WebEx. Our time and budget are better allocated these days. Travel to client sites is still important but we can deliver a lot more information without having to travel all the time,” Brennan said.

WebEx has also enabled Securian to provide customers with a more convenient and useful way to learn.

“Our customers can now view many training presentations when they’re available. No more three-day sessions away from their offices. Delivering information in smaller doses and at the customer’s convenience improves retention of the material,” says Brennan.

Enterprise-wide, Securian has now adopted a blend of training by combining online presentations with in-person classes to make face-to-face meetings as valuable as possible.

“We use the online presentations to get everyone on the same page before they enter the classroom,” says Brennan.

The Future

The impact of WebEx on Securian has caused Brennan to begin exploring new applications and opportunities for using it to generate revenue.

“We want to begin reselling our WebEx license to our close partners. One of our key partners, a financial planning firm with offices all over the US, has already expressed interest,” says Brennan. Her unit is also looking into the WebEx Ecommerce module to facilitate payment for customer training.

Another goal for Brennan is to make more sophisticated use of the system’s robust capabilities across the enterprise. Plans include using WebEx Sales Center for new product teams and leveraging Training Center’s hands-on lab and breakout room features to provide more focus during training. She’d also like to see growing proficiency with On Demand sessions, using more advanced editing and video, for instance.

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HIGHLIGHTS

- Sixty percent growth in number of students and limited facilities hindered Securian’s ability to deliver effective hands-on training.
- Use of On Demand Module™ presentations outside of the classroom (in-person and virtual) pre-trained students and improved the quality of face-to-face meetings.
- Stellar outcome from the self-paced module use in one business unit resulted in enterprise-wide adoption of WebEx Training Center, Event Center and Meeting Center.
- WebEx accelerated Securian business processes – speeding distribution and improving quality of information, increasing convenience for clients and partners and making face-to-face time more valuable.

