

Case study



“ I love the data that we are able to get from i-snapshot. It’s a miracle! ”

Shira Zucker, Sales Operations Manager, Symetra

The industry: Financial intermediation

The location: North America

Number of field sales: 15-25

The background:

Symetra Financial Corporation provides retirement plans, employee benefits, life insurance and annuities through a national network of independent advisors and agents.

Dating back to 1957, Symetra Financial has grown to become a family of companies that together serve more than two million customers in all 50 states of America.

The enquiry:

Symetra uses a number of different processes and databases across the organisation to measure various field sales activity.

Shira Zucker, Sales Operations Manager, works with a national sales team of two regional managers and 18 wholesale reps she says, “All of the measurements which we had in place revolved around customer activity, which was extremely valuable.

“However, I wanted to implement a tool in our division that could measure sales activity and help drive the right behaviour in the field. I wanted a solution which could give me the ability to monitor individual’s performance levels and help our regional managers improve their coaching of our sales team.

“Incredibly, the tools which I had come across couldn’t offer what i-snapshot does! A coded message at the end of each sales call? It sounded too easy! Surely it couldn’t provide the in depth information which I needed?”

The success:

Symetra decided to trial i-snapshot in November 2007, by January 2008 they were fully live. Due to its ease of use, the sales team were up and running with it very quickly.

Shira now uses i-snapshot to identify field sales performance, and from this data has implemented programs to address the training needs, leading to a more effective sales team.

Shira says, “i-snapshot is improving our ability to track field sales activities, so we can then identify where training requirements are needed and then coach.” She goes on to say, “We can also look at overall activity, the topics which are being discussed with clients, and who we are calling on and then match that with sales volume, so we have a much better line of sight to the sale.

“We can also identify ‘master practitioners’ on the team and understand what they are doing well so that we can coach our average performers and improve the overall effectiveness of their calls. 12 of the 15 reps who are on the team now are meeting their activity standards - with 9 of them meeting and exceeding their goals. In current marketing conditions I would say this is a great result.

“And the added bonus – the cost to implement, especially when you compare to other solutions – it is so low!”



i-snapshot
Driving Sales Performance

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