Keys to Successful Agent Adoption of Technology
Mike Shea, Director of Customer Success
Tyler Beeson, Customer Success Manager
Best Practices

• Getting off on the right foot

Panel/Discussion

• Adoption is a team sport
When it comes to Adoption…
#1 – Executive Engagement
#2 – Realistic Goal Setting

- Leverage business strategy
- Specific and realistic
- Short and long term
#3 – Articulate Vision
#4 – Create Change Agents
#5 – Training!!
#6 – All Hands on Deck
#7 – Success Breeds Success

- Share success stories
- Reinforce achievement
- Recognitions / contests
#8 – Disincent Paper
#9 Incent eApp / Ticket

- Extra comp
- Bonus points
- iPad giveaways
- Agents & Internal Staff
What Are Your Competitors Doing?
Term Quote Suppress Paper

**Principal National Life Insurance Company**
- **Term Insurance (20 yrs)**
  (Preferred Non Tobacco)
- **Underwriting Requirements**
  Nearest Age 37
  NOTE: Note: rates effective 3/17/2012.
- **Life TeleApp Request** is a short application. Carrier completes the medical questions.
  Actual premium determined by carrier and may differ from this quote.
- **Paper Forms**
- **e-App**
- **Drop Ticket**
- **$247.75**

**MetLife**
- **GLT (20 yrs)**
  (Preferred Plus Nonsmoker)
- **Underwriting Requirements**
  Nearest Age 37
  NOTE: **Rapid eUnderwriting process and rules apply for this product. Please refer to the company material for more information.**
- **Paper Forms**
- **e-App**
- **Drop Ticket**
- **$254.00**

**Nationwide**
- **Nationwide YourLife Term 20 - NFN, Allied, W&R, Hantz**
  (Non-Tobacco Preferred)
  Nearest Age 37
  NOTE: This product is for Nationwide/Allied agent, Waddell & Reed, and Hantz use only.
- **Paper Forms**
- **e-App**
- **$255.00**

**Security Mutual Life Insurance Company of New York, Binghamton, NY**
- **LT Security Plus (20 yrs)**
  (Preferred Nonsmoker)
- **Underwriting Requirements**
  Nearest Age 37
- **Paper Forms**
- **$255.00**
Term Quote Suppress Paper

Distributors utilizing this feature saw an average 71% increase in electronic apps or tickets e-Submitted from 2012 to 2013!!!
< 250k not getting put through...
Panel Discussion...
Questions??