



Business Impact

140,000 users
trained **effectively**

Reduced underwriting
and processing **costs**

Simplified systems by
migrating from
7 systems to 1

CASE STUDY

How an Impactful Blended Learning Program Improved Training and Adoption at a National Insurance Company

Situation

One of the largest insurance and financial services companies in the United States has earned a reputation for putting its customers first. To help the company continue to efficiently scale its business while servicing its customers at the highest possible levels, they are transforming their legacy claims environment and processes. Guidewire ClaimCenter and PolicyCenter were selected as the technology solutions, providing an upgradeable and flexible foundation to help the organization improve its speed to market and provide ongoing system enhancements while consolidating all policy administration systems. The ultimate goal is to help the company increase its customer service capabilities, enable better underwriting risk analysis, and provide the flexibility needed to grow the business.

- Comprehensive **blended learning solution** and training gives insurance organizations the flexibility to work effectively in **times of change**

The Challenge

The insurance provider wanted a partner to help support and augment their training and performance teams. There were several challenges to overcome to achieve this transformation:



Audience: The audience consisted of both internal and independent agents who sold the company's products and services. The training needed to support both audiences while being accessible, enjoyable, and impactful to keep all agents engaged. This system was rolled out on a state-by-state basis, including independent rules and regulations for states and regions that needed to be accounted for in the training materials.



Project Length: The timeline needed to be compact. The training materials needed to address upgrades to the system as well as changes from the previous version of the software.



Multiple Learning Management Systems: Halfway through the project, the organization switched their learning management system; however, they didn't retire the original system, which meant multiple LMSs needed to operate effectively and still deliver consistent and effective training.

GP Strategies® Solution

GP Strategies has been the insurance provider's strategic performance partner for more than six years and provided experienced instructional designers to augment their training and performance teams. These teams used a blended combination of Captivate eLearning simulations and courses, instructor-led materials, job aids, quick reference guides, and a unique virtual training environment to address the challenges noted above.

1. The GP Strategies team implemented and maintains a Virtual Training Office (VTO) that accompanies the implementation of Guidewire PolicyCenter. The VTO is a replica of the live system and was designed to engage all insurance agents and internal Associates, supporting agents, project teams, business users, and the training teams in three ways:
 - Supplemental hands-on face-to-face training.
 - Free-play training for Agents and Associates to practice various business processes using step-by-step information cards.
 - As a replacement when other testing environments are down or are not available for access. The VTO environment is used in order to create and validate job aids and CBTs by accessing a live system with no down time.
2. To support the agents on the transition to Guidewire, the GP Strategies team created PolicyCenter specific documents for the internal K-Base system, a database of potential and actual questions and responses, to account for the differences by region and state. The team also contributed by assisting the Help Desk in the weeks after launch via group chat with issues raised by the agents and the business, updating the database of questions and answers based on these interactions.
3. The needs of the organization are continually evolving so it was critical that the GP Strategies training lead is involved in most design meetings and has a first-hand look at what is changing. They then are responsible for accounting for these updates in five areas:
 - Training material updates for the upcoming implementation
 - Training material creation for the deltas between the old and new system for those who received training already
 - VTO system and data updates
 - K-Base updates
 - Live Chat for Agents updates
4. Because there were multiple LMS systems, the GP Strategies team made sure to account for different needs while developing training materials, creating materials to accommodate both versions of the LMS.

Business Impact

The Guidewire PolicyCenter simplified the policy management life cycle for Agents and Associates by moving from seven legacy systems to one system. PolicyCenter results in increased “no-touch” policy binding, meaning reduced underwriting and processing costs. The GP training solution for the transformation trained 140,000 users through eleven releases. The strategy and dedication from both the GP Strategies and customer teams has created a comprehensive and flexible blended learning and training experience for not only the customer’s employees, but also the independent agents. Due to the success of the GP training solution, agents, staff, and associates can accurately utilize the PolicyCenter software to perform their specific job roles easily and efficiently.

During the COVID-19 pandemic, the GP Strategies and customer teams worked remotely and implemented a training program that would benefit all of the Associates virtually, ensuring that training and project implementation could take place from anywhere.

- ● ● To learning more about training for Enterprise Technology, visit www.gpstrategies.com.

About GP Strategies

GP Strategies is a leading workforce transformation partner—one of the few truly dedicated global providers in the marketplace providing custom solutions. We believe our transformation focus, when paired with deep listening, a customer-centric approach, and innovative expertise, enables our clients to routinely achieve superior business and operational results from our evidence-driven and technology agnostic recommendations.

Whether your business success requires a change in employee performance and mindsets, learning technologies, or critical processes, GP Strategies is the transformation partner you can trust.

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