

CASE STUDY

California Casualty Creates Universal Language; Experiences Sales Success with Janek Training

Summary

California Casualty, an insurance provider catering to specific markets, sought a sales performance solution partner who could provide a framework for universal language and a needs-based selling approach.

Through a deep dive into California Casualty's sales processes, target markets, and overall business situation, Janek gained full fluency in the company, and were able to develop and deliver a comprehensive sales performance solution.

“Janek was very open and receptive to making specific role-plays around how we communicate with our customers - the representatives really felt engaged and that the material was applicable to what they do.”

Lisa Pearne
VP of Sales

About California Casualty

Founded in 1914 as a workers' compensation insurance firm, over the ensuing decades, California Casualty has grown and expanded to become a comprehensive insurance provider for specific markets. Among their clientele are law enforcement, firefighter, education, and healthcare organizations and unions. The company offers personal insurance – including auto and property insurance in the majority of the United States.

Through partnership with other insurance organizations, California Casualty also offers an array of other products – such as personal liability, outdoor recreational vehicles, and pet insurance.

The Challenge

California Casualty places a premium on sales professional development and saw an opportunity to significantly improve their results by bringing in an outside sales training partner who could help them create a universal, common language that would be utilized throughout the organization.

In particular, the company desired a wholly customized curriculum that they could also incorporate into their onboarding process for new hires. Janek Performance Group was selected precisely because of that capability.

The Solution

Janek's team engaged in a complete and comprehensive research strategy to gain full fluency and understanding of California Casualty's organizational structure, sales and business processes, target markets, and overall sales situation. Upon completion of this phase, it was determined that a wholly customized Critical Teleselling Skills (CTS) workshop for sales professionals should be the first event. The reinforcement of CTS came through a wholly customized Critical Sales Coaching Skills workshop for sales managers and Train-the-trainer certification in Janek's methodology for California Casualty's own training and development staff.

Following design of these solutions, Critical Teleselling Skills workshops were delivered directly to participants by Janek Sr. Sales Trainers. Attendance was capped at 18 students per session for an effective learning environment, and the workshops included both inbound and outbound sales reps, and sales managers who went on to receive further training in the Critical Sales Coaching Skills workshop.

The Results

As a result of the total sales performance solution, California Casualty was able to realize significant sales performance gains in a number of areas. First, the organization embedded the learned knowledge and skills into their onboarding process, leading to faster ramp-up to full productivity for new hires.

The company also saw considerable gains in their sales KPIs and other metrics – including close rates, premium per deal size, and Net Promoter Score. Overall customer satisfaction was likewise improved, and California Casualty has continued the collaborative relationship with Janek over the past several years.

We want to learn about your specific sales challenges.

Contact us to see how we can help your organization achieve its sales performance goals.

www.janek.com

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