

Spokesperson Training

John Hancock Spokesperson Training

Challenge: To develop and improve the presentation and relationship-building skills of regional sales directors of John Hancock, an insurance and financial services company, to make their presentations more persuasive and help them continue to earn customer respect as trusted partners for long-term care insurance.

Target: John Hancock regional sales directors responsible for encouraging key distributors and firms to sell John Hancock's long-term care insurance.

Solution: Bottom Line organized a day-long presentation skills training session for John Hancock's sales directors. Prior to the workshop, Bottom Line sent a questionnaire to participants asking them about specific topics they'd like to cover during the session. Bottom Line compiled the participants' responses and focused on the most popular presentation aspects mentioned. We then prepared separate workshops on: understanding your audience, overcoming anxiety, preparing your presentation and presentation skills you can use.

Because the sales directors already were very experienced at making presentations, we wanted to ensure the session contained new, relevant information for them. The training program also incorporated a hands-on element through taped presentations. At the beginning of the workshop, we taped participant presentations made to the entire group. At the end of the day we taped each person again giving the same presentation. This offered a visual representation of how much the workshop improved each person's presentation. The goal of the before-and-after taping was to make the directors feel more comfortable with their sales pitch from introduction to the close of a sale. The participants not only learned something, but could visualize their enhanced presentation skills as well.

Bottom Line wrote a summary packet of key points that were discussed at length in the workshop. The packet was a compilation of helpful reminders that all attendees were able to take away with them to use in the future.

Outcome: Overall, the workshop was a success. Based on the results of the seminar evaluation forms, every participant said it was either helpful or very helpful. The materials, handouts and presenters were rated as very good or excellent. The before-and-after videotaping of each attendee was highly praised. All participants

reported that they improved in their presentations. One participant said Bottom Line did a “good job handling an experienced group,” while another individual felt the workshop was “really the first workshop where all the information was great and presented in a helpful way.”