



THE CHALLENGE

Jim Mellin, Equitable Advisors' Chief Sales Officer, wanted to establish consistent and uniformed utilization of Equitable's 5-step sales process. To do so, he decided to certify all of Equitable's 1,600 developing sales force (DSF) advisors and its 220 branch and sales managers on the process. There were several challenges for certifying DSF's, including the following:

- Equitable's sales organization was located in >50 branch offices across the United States
- The certification process needed to provide consistent delivery and review of individual DSF's presentations of each step in the sale process

- Each DSF presentation needed to be graded/rated
- The certification of each individual needed to be tracked and reported on in real-time
- The certification was taking place during a pandemic
 These challenges dictated Equitable identify a partner to
 assist in defining and implementing an online certification
 process. Equitable turned to its learning management
 system (LMS) provider, Pinpoint Global Communications
 (Pinpoint), for assistance. Pinpoint translated Equitable's
 business requirements into a solution with the following
 functionality:

THE SOLUTION

Communications

- Set up customized webpages in EAVU (resource pages) which contained instructions for the advisors on the assignment, QRC's, sample videos and grading scale
- Email notifications to all users informing them of the assignment
- · Promotion of the new initiative on the video coach page with deep links to quick guides
- Notification of the rating scale where each advisor must attain a 4-star rating or higher

Training

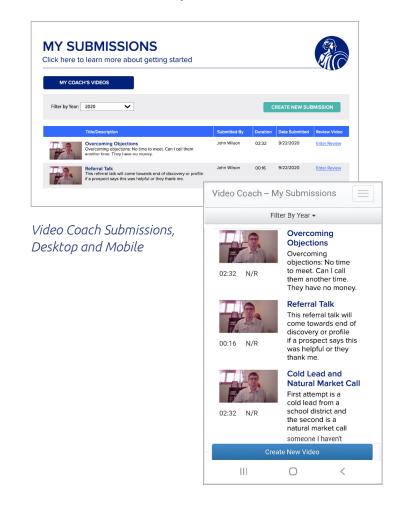
- Hosted Online videos of presentations on EAVU for advisors to review prior to their submission
- Provided training guides on EAVU educating users on the steps of the process and how to submit their videos
- Delivered guides for managers on how to review submissions and define grading scale

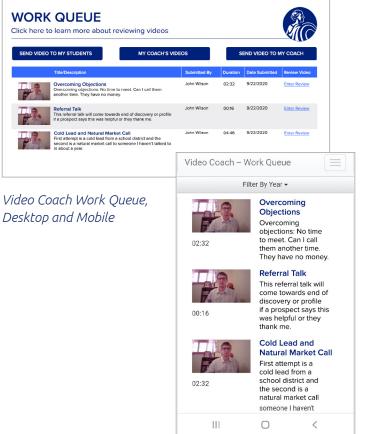
HOW IT WORKS

- Demonstration of each advisors knowledge of the sales process was done through video submissions within EAVU's Video Coach tool
- Enhance the video coach tool to allow the advisor to select the category or step in the sales process they will be certifying in their submission.
- Advisors submit videos to the system recorded from their desktop or iPhone/Android/tablet
- Video submissions are automatically routed to their manager (coach)
 for review and rating using the existing hierarchy setup in the system
- Advisors and managers are notified automatically via email when a submission was created and when the review was complete
- Managers utilize the video coach platform to provide timestamped feedback of the video submission and rate the video on a scale of 1-5 stars
- Video Coach Watch parties in order to promote adoption of the initiative, virtual "parties" were held via webmeeting where the group reviews each video and provides real-time feedback on each submission

"THE USAGE OF PINPOINT'S
VIDEO COACH HAS ENABLED
EQUITABLE TO CERTIFY
MORE THAN 85% OF THE
DSF'S ON STEP 1 IN THE SALES
PROCESS AND 65% IN STEP
2 OF THE PROCESS. THE
IMPACT ON OUR DSF'S SALES
SKILLS AND OVERALL
UNDERSTANDING OF THE
SALES PROCESS HAS
IMPROVED GREATLY."

— Taylor Bishop Manager, Online Learning Equitable Advisors

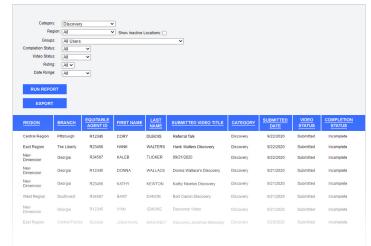




TRACKING AND REPORTING

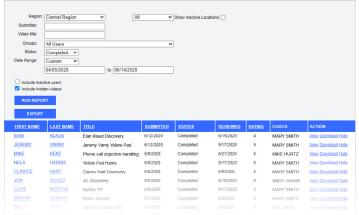
Three Video Coach reports were made accessible to track user engagement and progress toward the goal of certifying the advisor population on the sales process. Each report was complete with a set of filters to allow the reporter to filter data in real time by hierarchy, status, submission date, submitter and video title.

Video Coach Categories Report



- Displays the results of each user's submission along with the category in the sales process, the rating that the user attained, the status of the submission (complete/incomplete) and who conducted the review
- This report was used to determine the number of users who have attained the goal of properly demonstrating the sales process by attaining 4+ stars in each step in the process

Video Coach Summary Report



 Displays a list of all Video Coach submissions including rating, coach and the ability to view comments and download the video for sharing of best practices

Video Coach Dashboard Report



• Displays a breakdown of number of submissions to view utilization of the video coaching tool based on location and group.

THE RESULTS



1,600 DSFs Registered

1,600 DSF and 220 Sales Managers registered for Video Coach



3,150+ Videos Submitted

Submitted videos



80%DSFs Certified

DSFs certified on discovery step in process



65%
DSFs Certified

DSFs certified on profile step in process

Results are based on information 9 months after deployment