ProPractice
Case Study
India

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ProPractice^{TM} Case Study, executive summary

In August 2020 we started a ProPractice pilot with our partner, a large training company in India, part of one of the largest insurance and hospital groups in India. They are specialized in Life Insurance, Health Insurance and Hospitals.

The duration of the pilot was 4 months and 110 participants were selected in 3 areas of specialization.

Topic of ProPractice Modules:

Health Insurance and Life Insurance:
- Module 1: Fixing appointments
- Module 2: Handling Objections
- Module 3: Asking for referrals

Hospital team:
- Module 1: Patient scenarios for nurses at home
- Module 2: Front Office scenarios
- Module 3: Patient scenarios for nurses in hospital

Top 5 Feedback:
Note: We left the grammar exactly as it was sent to us by the participants

1. This proves the Saying PRACTICE MAKES MEN PERFECT. A very unique and wonderful self-learning tool where learning was fun with lots of engaging at all points. This will surely help the learners learn at their pace and time and comfort. The most beautiful tool I have experienced in my 12 years of insurance career.
2. The ProPractice tool is an excellent way to practice the scripts & the objection handlings. It also shows the key words to say. The video recording is again a good way to practice & work on self-improvement. It certainly was a good motivation to practice & perfect the scripts.
3. ProPractice is a wonderful application and it has helped me to talk to our customers with pointers and agenda, where I feel confident as I have prepared scripts to be used and follow a road map.
4. The ProPractice tool has helped me to achieve better performance and achieve better patient relationships
5. The ProPractice tool is user friendly, easy to use and allowed me to practice all the scripts. Really loved using the tool.

Top Results:

1. Life Insurance new referral acquisitions over baselines: **80% increase** over baseline
2. Health Insurance new referral acquisitions over baselines: **73.5% increase** over baseline for team North & East and **40% increase** over baseline for team West & Central
3. Hospital performance improvement score after 60 minutes of practicing: **101.6%** for module patient scenarios for nurses at home, **107.7%** for module front office scenarios and **115.7%** for module patient scenarios for nurses in hospitals

Survey Outcome

Questions asked in the survey

1. Question 1:   I knew exactly what was expected of me during the pilot
2. Question 2:   I have certainly seen the benefits for my customer, for my company on and for me the chosen subject/topic for the pilot
3. Question 3:   The ProPractice tool was an excellent support tool when practicing with the chosen subject/topic
4. Question 4:   The ProPractice tool has helped me to better perform in my job
5. Question 5:   The ProPractice tool has helped me to achieve my goals
6. Question 6:   By practicing with the ProPractice tool, I feel more confident in offering the product to/handling the situation with my customers/patients
7. Question 7:   By practicing with the ProPractice tool, I can deal better with objections from my customers/patient's situations
8. Question 8:   By practicing with the ProPractice tool, I have generated more sales/appointments/better patient relationship
9. Question 9:   The ProPractice tool motivated me to practice more
10. Question 10: I am glad that I was able to participate in this pilot

ProPractice Pilot Survey Outcome

Question	No opinion	Agree	Fully Agree
QUESTION 1	0	15	85
QUESTION 2	4	13	85
QUESTION 3	1	8	93
QUESTION 4	3	13	85
QUESTION 5	5	27	70
QUESTION 6	1	18	83
QUESTION 7	2	12	87
QUESTION 8	3	30	69
QUESTION 9	3	15	84
QUESTION 10	1	7	94
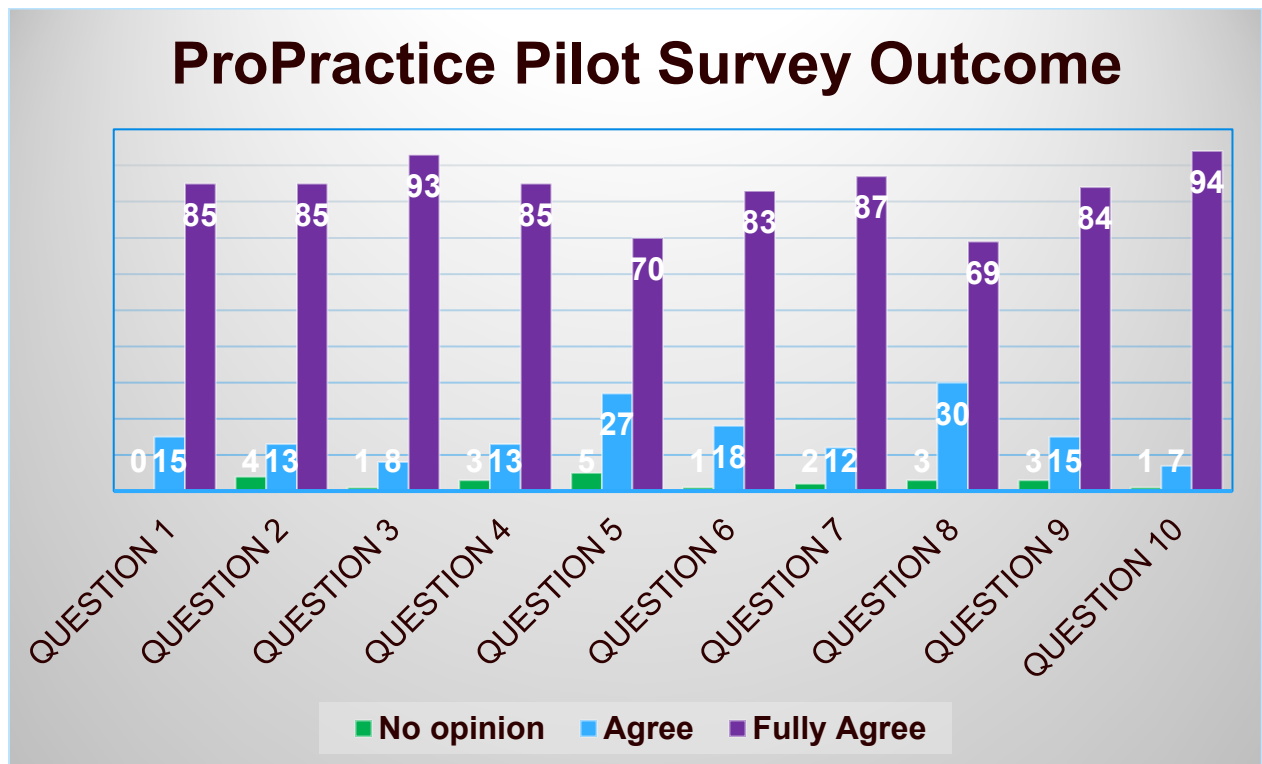
General background information

Country:	India
Company:	Cohen Brown's training partner in India and
	part of the largest insurance and hospital group in India
# of participants:	110
Participants function:	Trainers who train, observe and be role models for the agents and nurses during their job. The trainers are the participants of the pilot and learn the scripts, not the agents/ nurses.
Three areas:	Life Insurance
	Health Insurance
	Hospital
Languages	English and Hindi
Topics of modules:	Life and Health Insurance: Fixing appointments, Handling Objections, Asking for referrals
	Hospital: Patient scenarios for nurses in the hospital, patient scenarios for nurses at home and Front Office scenarios
Duration:	4 months (start in August)

Goals:

1. Create a successful case study for Indian Market
2. Learn how to implement and embed the ProPractice process in a structured way
3. Provide positive ProPractice results for board members (improvement of assessment scoring after practicing and increase of referrals)

Activities necessary to achieve the goals

1. Making the managers accountable and responsible for the ProPractice process (Leader-Led)
   - Organize motivational Kick-Off and training sessions with participants led by the managers:
     - ➢ What is and the importance of ProPractice
     - ➢ Goals and activities
     - ➢ Share success criteria
     - ➢ Explain what and how to measure success criteria
     - ➢ Training ProPractice
   - Weekly operating rhythm (with participants)
     - ➢ Monday morning performance meeting
     - ➢ Daily briefing and debriefing
     - ➢ End of the week debriefing

- ➢ Regularly scheduled coaching sessions
  - Weekly calls with CEO, Process Manager, and CBMG Consultant
    - ➢ Share and discuss results
    - ➢ Discuss challenges
    - ➢ Coaching tips and tools
    - ➢ Weekly manager action plan
2. Set up an internal coach team who support and coach the managers during the process (5)
    - Learn how to create ProPractice modules
    - Learn how to analyze, observe and provide feedback
    - Set up coach sessions with their managers
    - Weekly calls with Process Manager and CBMG Consultant
        - ➢ Update results
        - ➢ Discuss challenges and share best practices
        - ➢ Weekly action plan how to support and coach the managers
3. Run Best Practice rounds (monthly)
    - What is a Best Practice and what are the criteria?
    - How to run a Best Practice session (online)
    - Collect Best Practices
4. Focus on quantity and quality
    - Schedule deadlines per module for baseline ProPractice assessment scoring (assessment before practicing) and assessment scorings after practicing
    - Focus on # of practice attempts and average practice time per participant
    - Create quality skill indicators to focus on what to observe and what to provide feedback on when observing participants customer conversations

Total Feedback in Categories

Note: We left the grammar exactly as it was sent to us by the participants

General ProPractice feedback

1. This proves the Saying PRACTICE MAKES MEN PERFECT
2. A very unique and wonderful self-learning tool where learning was fun with lots of engaging at all points. This will surely help the learners learn at their pace and time and comfort. Thanks a ton for this initiative. Beautiful tool I have experienced in my 12 years of insurance career.
3. The CB Pilot is a very good concept to learn, adopt and execute new concepts. It helps a learner to learn and redo topics at learners' pace. This concept will hold on user's interest level high
4. Through CBWay/ProPractice help us to bring the power of extensive training catalogue which is definitely helping us in overall process...
5. New way of learning more actively with the change management. Really benefitted a lot.
6. This Is one of the Best tools to practice the scripts and handling objections and useful to practice our participants to bring best Results.
7. This is an excellent tool for self-development and will definitely help our Sales team as well

Feedback regarding skill improvement

1. The ProPractice tool is an excellent way to practice the scripts & the objection handlings. It also shows the key words to say. The video recording is again a good way to practice & work on self-improvement. It certainly was a good motivation to practice & perfect the scripts.
2. This was super exciting project. It helped me in making my skills strong. Very Innovative way this project has for trainer to practice
3. It's an amazing tool for being more appropriate and professional in front of customers
4. It's a wonderful experience. This project gave us the chance to sharpen our skills and it helped me to get good references from the prospects.
5. ProPractice is a good tool which will help us individually to develop our skills in training trainees effectively with more engagement and as well as trainees to increase the sales
6. I am always eager to know about new things in training & this is a wonderful programme to gain extra knowledge
7. Handling Objections & have expertise in a wide variety of objections helps us as well our Managers & Advisors
8. It was a wonderful initiative taken by the company and this has helped me in improving my scripts and objection handling.
9. I had really helped to develop the communication skills further
10. I was glad to be part of pilot team, this tool is very essential and helpful for agents, me and company to perform better.
11. The project helps in self-evaluation and motivates to try more

Feedback regarding confidence and sales improvement
1. ProPractice is a wonderful application and it has helped me to talk to our customers with pointers and agenda, where I feel confident as I have prepared script to be used and follow a road map.
2. Most of the customers could not share phone number over phone. They preferred to send over messages. The structured way of probing seemed to be very professional & logical to the customer which helped to get the reference on good note.
3. ProPractice is a great tool as constant practice and assessments brought more confidence over handling objections.
4. I strongly believe, these scripts really helped us in making trainers more confident and, this will surely help the sales force in fixing up more appointments and handle the objections with improved Confidence.
5. Very apt for building basics & confidence through the practice sessions and will definitely help in achieving the goals
6. ProPractice was a nice journey. It gave us an opportunity to learn new things & refresh some important previous learnings. This will help us a lot in our Goals
7. It was an excellent tool which made me so confident in handling objections.
8. It will certainly help me to achieve the organizational goals and perform better

Feedback regarding patient relationship (hospital)
1. ProPractice tool has help me to better performance, better patient relationship with my customers
Note: Other positive hospital survey feedback was incorporated in other feedback categories.

Feedback regarding usage of ProPractice and scripts
1. The ProPractice tool is user friendly and easy use and practice All the scripts, really loved using the tool.
2. This is actually very much help full, the best feature is we can practice & see the recording for betterment, will ensure will learn more from it any able to apply.
3. Good learning opportunity and helped in real time scenarios
4. I got a clear view of the scripts and they are easy to learn and implement
5. Pro Practice tool has helped me to gather well-structured scripts that too in a simple easy go daily communicating language, it surely helped in remembering the script in an easy manner...
6. The way we practiced with help of the tool made use more effective in learning the Scripts and the assessments were timely to deliver what we learnt, with help of our mentors
7. ProPractice is Overall a good tool. In single Platform we can Practice and guide teams also
8. It's similar to talking in the mirror and looking for what we are saying and how we are saying ... it's a good tool...

Tips for improvement/Wishes/Further Customization

1. Please extend this support to Manager & advisors Level as well. So that we can motivate them to do practice more & it will give better results on field conversion
2. Thanks for this wonderful learning. Need more session on a regular interval.
3. Specific time per week must be planned with trainers, it should be mentioned in his calendar. Assessment should be in regional languages along with English. I am interested to translate it in Marathi language
4. There can be some amendments in the scripts used, such words e.g. Remunerated was found difficult to use in local market. Overall a very Impactful tool as per the Participants.
5. Enjoyed the simulator way of learning. Excellent. Hope the simulator is also designed in Hindi as well as in regional languages so that maximum benefit is delivered to end users
6. The ProPractice Tool is a good resource & I can see that it has the potential to be implemented. The challenge will be for the acceptance by BMs & Other Stakeholder's as it does not cover real world situations & needs further customization for it to be of use to them. Customization in local language is one suggestion from my end.
7. We have to also add one more option for scoring parameter apart from bullet points points-Like- Voice modulation, Effective/non effective
8. The script should be customized according participant if needed because exact verbatim script is not possible in when you communicate with customer.
9. Would be more helpful if we can practice in regional languages as many customers do not understand English and also translating the scripts from English to Regional Language makes them sometimes lose their effectiveness.
10. This is Good Tool, But to match all Agents it's very Difficult, Because of Video is not Comfortable, Because Most of Upcountry market Face Technology Issue, Its better For Cities