

# The ROI in Channel Partner Conferences: A Two Part Case Study

By: Allan Schweyer



# TABLE OF CONTENTS

- EXECUTIVE SUMMARY ..... 3
- THE ROI METHODOLOGY™ ..... 4
- OBJECTIVES MEASUREMENT AND METHODOLOGY..... 5
  - REACTION/SATISFACTION ..... 6
  - LEARNING ..... 6
- APPLICATION AND IMPLEMENTATION ..... 7
  - OVERALL ..... 7
- ASSESSMENT SPECIFICATIONS..... 8
- SUMMARY OF RESULTS FOR PHASE ONE ..... 9
  - CHANGE INDICATORS – ENGAGEMENT..... 9
  - REACTION AND SATISFACTION ..... 9
  - LEARNING ..... 10
  - OVERALL ..... 10
- SUMMARY OF RESULTS FOR PHASE TWO..... 10
  - REACTION AND SATISFACTION ..... 11
  - APPLICATION AND IMPLEMENTATION ..... 12
  - OVERALL ..... 12
- REACTION/SATISFACTION: PHASE ONE RESULTS VS. PHASE TWO ..... 12
- SUMMARY..... 14
- RECOMMENDED ACTION AND OBSERVATIONS ..... 14
- ACKNOWLEDGMENTS ..... 16
- APPENDIX A - ALLSANTE “ENCOUNTER”..... 17
  - PROGRAM OVERVIEW ..... 17
  - AGENDA..... 17
- APPENDIX B ..... 19
  - ABOUT THE REPORT AUTHOR..... 19
  - ABOUT THE STUDY AUTHOR..... 19
  - ABOUT ROI OF ENGAGEMENT..... 19
  - ABOUT ENTERPRISE ENGAGEMENT ALLIANCE ..... 19

# Allsante Inc. Case Study

## Part One

Allsante is a contrived name to disguise the true identity of the company involved with this study. This was a condition insisted upon by the company based on the fact that this report would contain potentially proprietary information it would not wish to share with competitors.

The study was completed by Todd Hanson, CRP, CPIM, President and Founder of Catalyst Performance Group and ROI of Engagement and was subjected to peer review by Allan Schweyer, Chairman and Head of Research for the Enterprise Engagement Alliance, in order to verify the methodology, data, and conclusions. This report was authored by Allan Schweyer based upon his analysis.

## EXECUTIVE SUMMARY

The 2009 annual “Allsante Inc. Encounter” event for Georgia/Louisiana healthcare insurance brokers was designed to increase sales and profits in those specific markets and engage channel partners with the company’s brand. The event included more than 50 key insurance owner/principal brokers, each of whom were individually selected and invited by Allsante Inc. The delegates were representatives of large brokers who were already contracted with Allsante, but were responsible for very little business. In this manner, Allsante filled its event with brokers who had high potential to drive greater sales. The event provided delegates with training, industry updates, relationship building and networking opportunities (see Appendix A for a full description of the event). The program also included company sales personnel for the respective markets, including sales management, department heads, service personnel and key corporate leadership representatives.

Programs of this nature are expensive, yet most providers believe they pay off by building better long-term relationships with resellers. After all, it stands to reason that brokers, who have a deeper understanding of products and closer relationships with a vendor, will sell more of that vendor’s goods and services. Nevertheless, in a time of careful fiscal restraint, Allsante wanted a deeper understanding of the actual Return on Investment (ROI) it could expect from the Allsante Encounter conference and hard data against which to make decisions around improving future programs.

Allsante collaborated with the “ROI of Engagement” Group to measure the Return-on-Investment (ROI) of Allsante Encounter 2009. Allsante understood that by raising participants’ engagement with the company, they could accomplish the ultimate objective which was clearly to increase sales and profits. But in between that ultimate measure (increased sales and profits) lay a complex analysis of each of the components of the event and the participants’ evaluation of those components both immediately following the event; and three and six months later. To understand this in a manner that would allow Allsante to make the best decisions possible about its event, ROI of Engagement employed the ROI Methodology™ to capture participants’ attitudes, learning, behaviors and actual outcomes following the event.

Initial results revealed that the program had made a profound change in the way brokers thought and felt about the company, its products, the business opportunity and its people. The strengthened trust and confidence in the company, along with deeper connections and contact with key company employees, translated into brokers presenting and quoting Allsante products more frequently. This in turn resulted in significantly stronger reported sales from event participants.

Part one of this case study examines the ROI process employed by ROI of Engagement and the “proof” of Allsante’s apparent success through The Allsante Encounter 2009. Part Two examines that actual change in sales of Allsante products among The Allsante Encounter 2009 participants,



(allowing for variables) and summarizes the ROI Allsante achieved from the event, including its costs and the additional profits generated by presumed increased sales.

*“The broker meeting was an absolutely enlightening experience. I came out of [it] with the thought that Allsante is one step ahead of the rest of the companies, and I feel absolutely more comfortable representing/selling the Allsante product. I exercised the service solutions a week after my return, and I was NOT disappointed.”*

## Program Objectives

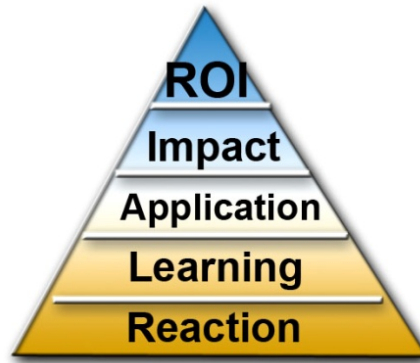
The program’s desired objectives were to increase reseller engagement that would lead to greater trust, a sense of loyalty and better relationships with Allsante and its employees. Communication objectives included vision casting for 2009 as well as awareness and product knowledge, training and selling skills. The company’s most desired objective was to change behavior among resellers so that they would increase Allsante presentations, increase quotations, highlight Allsante product advantages over others, and ultimately increase sales of Allsante small business and ancillary products.

Today’s market conditions, regulatory environment and competitive pressures have made it more important than ever to measure the results of investments in events like Allsante Encounter and for management to understand the tangible outcomes such annual initiatives have on business. With bottom-line results, leadership can properly decide whether to support the program’s continued existence. And, by making the results of this particular project measurable and credible, management can build the business case to measure more programs involving incentives, rewards and recognition, meetings, events, loyalty programs and marketing communications.

## THE ROI METHODOLOGY™

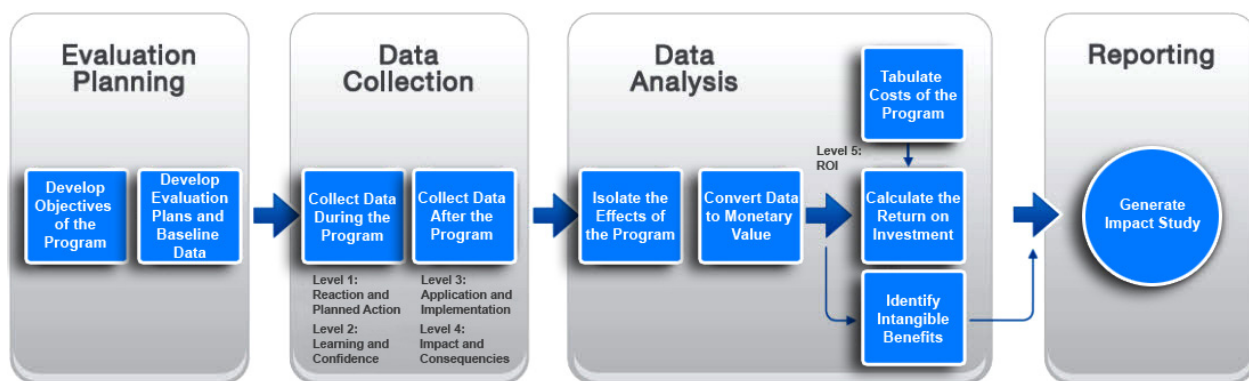
Allsante brought the ROI of Engagement Group (Certified ROI Professionals and strategic partners with the ROI Institute) on board to provide accurate and credible results measurement. ROI of Engagement used the ROI Methodology™ to measure program results (Figure 1). Used in thousands of cases in more than 50 countries, the ROI Methodology™ prescribes five evaluation levels and a disciplined process that includes a step-by-step approach to data collection, summarizing and processing data, isolating the effects of programs, converting data to monetary value and calculating ROI – all while adhering to strict guiding principles published by the institute.

### **The ROI in Channel Partner Conferences: - A Two Part Case Study**



*Figure 1: The ROI Methodology™*

Fundamentally, the ROI Methodology™ system is a process improvement tool which also identifies barriers and enablers to performance and provides evidence of business impact (Figure 2). When an evaluation is planned, the level of evaluation for the program is determined. For credibility, every impact or ROI evaluation includes a method to isolate the effects of the program on the particular business impact data. The complicated process of calculating the ROI of meetings and events is simplified by following sequential steps illustrated in the process model below (Figure 2) revealing a logical, systematic, step-by-step approach that keeps the process manageable and allows for tackling one issue at a time. Applying the model with strict adherence to guiding principles provides consistency from one ROI calculation to another.



*Figure 2: The ROI Measurement Process*

## OBJECTIVES MEASUREMENT AND METHODOLOGY

Phase One of the assessment was designed to measure changes in engagement, satisfaction with the broker/Allsante relationship and the effectiveness of the learning opportunities provided in the general and breakout sessions and through product training. Phase One assessment objectives were to be determined by the following types of questions:

### The ROI in Channel Partner Conferences: - A Two Part Case Study

## Reaction/Satisfaction

**Phase One asked:** *After participating in Allsante Encounter, have participants:*

- ♦ Changed the way they think and feel about the company, its products, the business opportunity and the people?
- ♦ Found value in attending the event relative to their investment of time?
- ♦ Expressed an Action Plan?
- ♦ Understood the Allsante value proposition and its worth related to a percent of premium<sup>1</sup>?

## Learning

After participating in the event, have participants acquired the knowledge and tools necessary to be successful in each of the following areas:

- ♦ Engaging clients to better health?
- ♦ Allsante Specialty Benefits?
- ♦ Allsante Individual<sup>2</sup>?
- ♦ Rising healthcare costs and Allsante's response?
- ♦ Underwriting and quoting?
- ♦ Concierge service?
- ♦ Billing, enrollment and contact center?
- ♦ Government affairs?

Phase Two of the assessment was designed to measure the actions taken and results achieved by participants three months after the event. Phase one of the assessment began where most event evaluation processes end – with a participant scorecard to assess the quality of the event overall and each workshop or session they attended. Phase One also asked participants what they intended to do with the information and ideas they gathered at the event. Remarkably, 95% of Phase One survey respondents agreed or strongly agreed that they would quote Allsante products more frequently as a result of having attended the “Allsante Encounter” event<sup>3</sup>.

---

<sup>1</sup> The value proposition is an analysis and quantifiable review of the benefits, costs and value that Allsante can deliver to customers and other constituents within and outside of the organization. It positions the value, where value = benefits – cost (including risks). Phase One of the study wanted to determine what percentage of premium the Allsante key benefits, costs and value were worth to brokers in a competitive situation.

<sup>2</sup> Allsante Individual offers a variety of individual family health insurance plans, including HSA-qualified plans and offers a high deductible in order to reduce premium cost. The event featured a session on this product.

<sup>3</sup> Catalyst Performance Group, Inc., 2009 Allsante Inc. Encounter – Georgia/Louisiana Brokers Survey & Assessment Results – Phase One, 2009. (Note: all information in this case study is based upon Phase One and Phase Two of this report, both authored by the Catalyst Performance Group on behalf of Allsante Inc.).

This is encouraging data but it begs the question, how many brokers actually presented Allsante products more often after the event and, among participants, did sales increase? Phase Two of the ROI process set about to answer the first question and, in part, the second question. Phase Three (presented in part two of this case study) answers the second question with hard data gathered six months after the event.

The Phase Two analysis updated brokers' attitudes toward Allsante and their actual activities in presenting, quoting and selling Allsante versus their expressed attitudes and intentions in Phase One. Survey participants were asked about their actual behaviors and real actions with respect to Allsante products over the three months following the event. Those results are described below.

## APPLICATION AND IMPLEMENTATION

In summary, the survey asked – *“In the past three months since the Allsante Encounter, I have frequently”*:

- ◆ Presented Allsante products
- ◆ Quoted Allsante products
- ◆ Sold Allsante products
- ◆ Contacted my Allsante Sales Representative to support me in client proposals
- ◆ Contacted my Allsante Account Executive to support client renewals
- ◆ Contacted Customer Service for support
- ◆ Contacted the Allsante Renewal Area for support
- ◆ Utilized the online quoting service to aid me in my proposals

### Overall

In the past three months since the Allsante Encounter, participants were asked:

- What were the keys to your quoting success?
- What activities have been undertaken to support Allsante product sales?
- What primary thing has been accomplished differently to increase Allsante sales?
- What additional follow-up would be beneficial?
- What personal accomplishment/improvement related to Allsante product or services sales has resulted by attending the Allsante Encounter?
- What challenges to the achievement of your sales goals in the coming year will be the most difficult to overcome?
- How satisfied are you with the level of Allsante management support you received after the meeting?
- What specific suggestions do you have for improving support from Allsante?



## ASSESSMENT SPECIFICATIONS

The assessment tool used was a Web-based application designed to build, distribute, track and tabulate on-line surveys. For both phases, event participants were sent three email invitations (an initial invitation and two reminders) to participate in the survey. Each promised complete confidentiality and a chance to win a \$100 gift card. A random drawing for five winners was completed at the close of each survey, with the winners from the Phase One survey being published in the Phase Two survey invitation.

In the Phase One assessment, 50 invitations were sent generating responses from 42 or 84% of participants. Sixty-four percent (64%) of respondents were from Georgia while 36% were from Louisiana. Forty percent (40%) were owners/principals and 38% were sales representatives. Ninety-eight percent (98%) of them had sold Allsante products prior to attending Allsante Encounter. Thirty-seven percent (37%) had worked with Allsante products for more than five years. The remaining 63% had worked with Allsante products from less than a year to five years.

The Phase Two assessment sent 50 invitations and received 33 responses (66%). Of that number, 49% were owner/principals while 39% were sales representatives. Ninety-one percent (91%) had sold Allsante products prior to attending Allsante Encounter. Thirty-three percent (33%) had done so for more than five years (15% of which indicated more than 15 years) and 52% had done so for one-five years. The remaining 15% had worked with Allsante for less than one year.

Both Phases One and Two surveys used a five point Likert scale with one (1) being the lowest rating and five (5) being the highest. The Specific Agreement scale used is shown in Figure 3.

<b>Evaluation Scale</b>	
<b>0 - 5 Scale</b>	
<b>4.5 and above</b>	<b>Excellent</b>
<b>4.25 to 4.49</b>	<b>Very Good</b>
<b>4.0 to 4.24</b>	<b>Good</b>
<b>3.75 to 3.9</b>	<b>Acceptable</b>
<b>3.5 to 3.74</b>	<b>Marginally Acceptable</b>
<b>Below 3.5</b>	<b>Unacceptable</b>

*Figure 3: Phase One and Two Evaluation Scale*

# SUMMARY OF RESULTS FOR PHASE ONE

## Change Indicators – Engagement

The results from the Phase One survey, distributed right after the event, revealed a profound change in brokers' thoughts and feelings about the company, including its products, the business opportunity and the people. An average score of 4.64 on a scale of one (Unacceptable) to five (Excellent) was received on the 12 questions targeting their engagement levels vis a vis Allsante. The following outline the results of the 12 questions:

- ◆ 100% have more trust in Allsante
- ◆ 100% have more confidence the company will do what it says it will do.
- ◆ 95% are more confident that Allsante products meet their customers' needs.
- ◆ 95% are more confident that Allsante products meet their agency needs.
- ◆ 100% are more confident that Allsante customer service meets their agencies' needs.
- ◆ 100% are more excited about business opportunities with Allsante
- ◆ 78.5% are better prepared to take advantage of bonus plans and/or other incentive programs.
- ◆ 97.6% know more key people at Allsante that can help them succeed.
- ◆ 92.8% have deeper and better relationships with key Allsante staff.
- ◆ 85.7% have expanded their professional network of fellow brokers.
- ◆ 97.6% have a better understanding of the Allsante Value Proposition.
- ◆ 100% are more satisfied with Allsante

*"The event was great. It is a plus to know that agents are recognized by Allsante. The value of the role of each person to make a successful outcome for our customers is key, and I like knowing that your organization feels the same way. Thanks for the opportunity to see for myself."*

## Reaction and Satisfaction

Reaction and satisfaction questions as a whole were rated Very Good at an average of 4.45. Additionally, for those who provided comments, 100% were positive regarding overall reaction and satisfaction with the program. In fact, 46% suggested that the program be lengthened. The following outlines the results of the 12 questions applied to this section:

- ◆ 90.4% feel Allsante, its products; the business opportunity and its people represent a "perfect" solution.
- ◆ 97.6% have the knowledge and tools to effectively sell Allsante products.

## The ROI in Channel Partner Conferences: - A Two Part Case Study

- ◆ 97.6% said Allsante products provide excellent solutions for members.
- ◆ 84.3% believe Allsante products are highly competitive with other products.
- ◆ 100% feel Allsante broker services are highly competitive with other companies.
- ◆ 100% feel Allsante member services are highly competitive with other companies.
- ◆ 71.4% think Allsante rates are highly competitive with other companies.
- ◆ 92.8% are confident they can sell Allsante products.
- ◆ 100% are confident they will benefit from selling Allsante products.
- ◆ 95.2% plan to present Allsante products more frequently.
- ◆ 11.9% feel that in a competitive situation the Allsante value proposition is worth 10% or more; 14.2% feel it is worth 6-9%; and 50% feel it is worth 3-6%.
- ◆ 95.2% plan to quote Allsante products more frequently.

*“I went into the Allsante Encounter event thinking that Allsante was just another carrier and one that I had had poor experience with in the past. I left thinking that Allsante is the best carrier out there. I will definitely be selling more Allsante in the very near future.”*

## Learning

Participants said they gained the knowledge and tools needed to be successful. The average rating was 4.36 or Very Good. The Government Affairs (Average of 4.12) and Allsante One (Average 4.19) sessions were the lowest rated although these ratings were still good. The highest rated session was Billing, Enrollment and Contact Center with an average rating of 4.69 or Excellent.

## Overall

Brokers rated the quality of Allsante Encounter at 4.93 or Excellent. Overall value to the investment of time was also rated Excellent at 4.90. Fifteen percent (15%) felt that Allsante Individual was the least valuable part of the experience. The two most important takeaways cited by 37% of respondents were related to the importance of Allsante’s Customer Service initiatives. Thirty-two percent (32%) said that meeting the home office personnel and building relationships were the most important takeaways for them. Finally, 35% said that they needed more time in the agenda to get more information (in response to the question, “The meeting would provide better value if...”).

## SUMMARY OF RESULTS FOR PHASE TWO

Phase Two of the assessment was designed to measure the actions and results taken by participants three months after the event. This was an important element in determining true results ROI. It eliminated the “post-event high” that many event participants experience until they return to

### **The ROI in Channel Partner Conferences: - A Two Part Case Study**

their daily routines. The passing of three months allowed participants to put what they learned and felt into action and perspective – and to discern the tangible results. Participant brokers continued to feel that Allsante offered a perfect solution for them because they now had the education to sell the products. While not all felt Allsante’s rates are as competitive as other companies, the majority were confident that they would benefit from selling the products. Moreover, they planned to quote, present and sell them more frequently. Most importantly, 90% of them reported that they had more frequently sold Allsante products in the three month period after the event than before they attended Allsante Encounter.

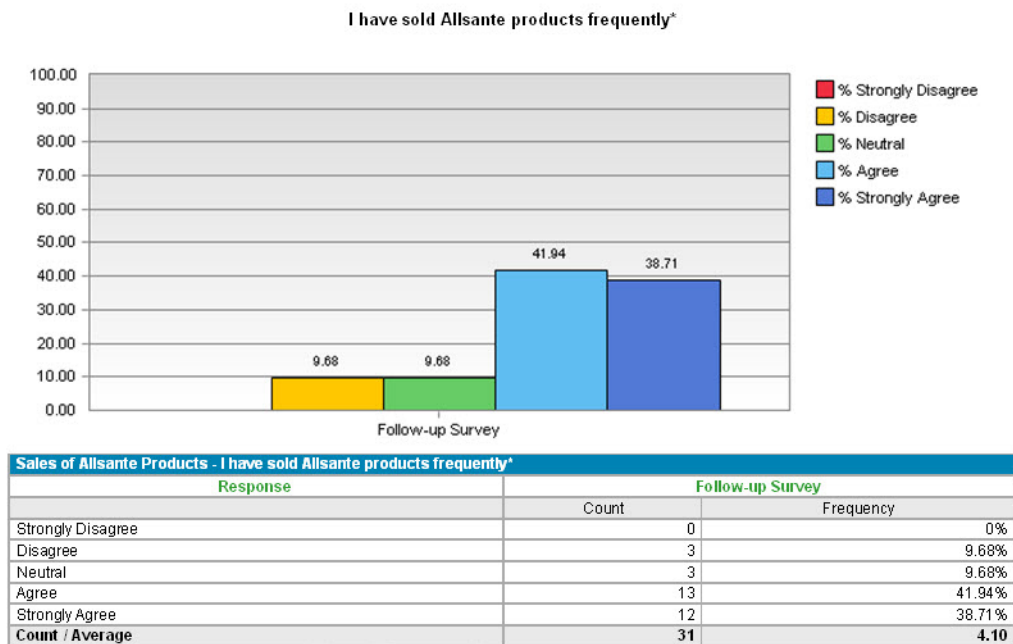
## Reaction and Satisfaction

Reaction and Satisfaction questions were rated at an average of 4.33 or Very Good overall. The two questions that were markedly lower in Phase Two were:

- ♦ I believe Allsante products are highly competitive with other products. Rated 4.03 or Good.
- ♦ I feel Allsante rates are highly competitive with other companies. Rated at 3.62 (Marginally Acceptable).

The Phase Two Survey revealed that three months after the event there was a slight trend in decreased satisfaction in all areas. However, these results are actually encouraging in that despite the time removed from the event, participants’ attitudes toward Allsante did not come off their initial highs in any significant way. (See Figure 4 for an example question/response.)

In the past three months since the Allsante Encounter:



*Figure 4 - Product Sales Reports Three Months After Event*

The majority of survey participants confirmed that they had presented; quoted and sold more Allsante products since the event. Most had also increased contact with their Allsante sales executive and customer service representative. And, all of them were very satisfied with the management support received after the meeting.

## Application and Implementation

The following summarize results from key questions in Phase Two about the application and implementation of what participants had learned at the Allsante Encounter event:

- ◆ 94% agreed or strongly agreed that they had presented Allsante products more frequently.
- ◆ 97% agreed or strongly agreed that they had quoted Allsante products more frequently.
- ◆ 90% agreed or strongly agreed that they had sold Allsante products more frequently (Figure 4).
- ◆ 71% had contacted their Allsante Sales Representative more frequently for client proposal support.
- ◆ 48.4% had contacted their Allsante Account Executive more frequently to support in client renewals.
- ◆ 71.9% had contacted Allsante Customer Service for support more frequently.
- ◆ 41.9% had contacted the Allsante Renewal Area for support more frequently.
- ◆ 51.6% had utilized the online quoting tools more frequently to aid in proposals.

## Overall

Common themes were recognized in the following areas:

- ◆ 50% said that they more actively quote Allsante on all cases.
- ◆ 31% said they now have a better understanding of Allsante and its products and feel more comfortable explaining options to clients.
- ◆ 20% wanted additional follow-up regarding supplemental or ancillary products.
- ◆ 50% commented on their ability to present Allsante better based on their now expanded knowledge of Allsante products and people.
- ◆ 100% of those who commented were very satisfied with the level of Allsante management support being received after the meeting.

## REACTION/SATISFACTION: PHASE ONE RESULTS VS. PHASE TWO

The following points summarize how participants think and feel about the company, its products, the business opportunity and the people three months after Allsante Encounter. The first two figures

### **The ROI in Channel Partner Conferences: - A Two Part Case Study**



represent no change from Phase One, while the remaining show only a slight decrease, with the exception of an increase in the belief that Allsante products are highly competitive with other products.

96.8% said Allsante and its products, business opportunity and people represent a perfect solution for them.

- ◆ 100% said they now have the knowledge and tools to effectively sell Allsante products.
- ◆ 96.8% (vs. 84.3%) believe Allsante products are highly competitive with other products.
- ◆ 96.8% (vs. 100%) believe broker services are highly competitive with other companies.
- ◆ 93.7% (vs. 100%) feel Allsante member services are highly competitive with others.
- ◆ 81.2% (vs. 97.6%) said that Allsante products provide excellent solutions for members.
- ◆ 65.6% (vs. 71.4%) feel Allsante rates are highly competitive with other companies.
- ◆ 87.5% (vs.92.8%) are confident they can sell Allsante products.
- ◆ 90.6% (vs. 100%) are confident that they will benefit from selling Allsante products.
- ◆ 81.2% (vs. 95.2%) plan to present Allsante products more frequently.
- ◆ 90.6% (vs.95.3%) plan to quote Allsante products more frequently.

*"I have been able to speak better regarding the culture of Allsante. It is very impressive and is an excellent topic when presenting the Allsante products... I present Allsante at every opportunity and explain, I believe, the commitment of Allsante and its staff to business owners to provide the coverage and service available in the industry today. "*

## SUMMARY

Both Phase One and Phase Two surveys represent strong evidence that Allsante met its ROI objectives with The 2009 Allsante Encounter event. The tremendous uptick in broker engagement, as evidenced through the high majority citing better attitudes toward and improved connections with Allsante, have led to increased sales, according to the brokers who attended the event.

With 94% presenting Allsante products more often; 98% quoting Allsante repeatedly; and 90% reporting greater sales of Allsante products, the benefits would seem to far outweigh the cost of the event. And, the areas that need improvement are clearly reflected in the percentage calculations for management's future attention. Nevertheless, for Allsante to truly understand the ROI, the actual costs of the event must be compared to real increases in profit derived from increased sales of its products by those brokers that attended Allsante Encounter 2009. Moreover, increased sales, revenues and profits must be isolated against any variables that occurred in the marketplace overall, or among Allsante's market specifically in the time period in question. This deeper ROI analysis was conducted in Phase Three of the research and is reported in Part Two of this case study.

## RECOMMENDED ACTION AND OBSERVATIONS

The primary objective for measuring results is to gather insight into continuous improvement and to make better decisions about the allocation of resources. As a result of this study and observations made during the event (and pending Phase Three results) the ROI of Engagement Group in collaboration with Allsante leadership offered the following recommendations:

- ◆ Expand the program to a full day and a half, or even two full days.
- ◆ Allow more time in the meeting agenda for discussion to harvest new ideas and innovative solutions from brokers.
- ◆ Improve upon the Local Market session to disseminate market intelligence by region.
- ◆ Expand the Legislative Session and allot more time for content and questions.
- ◆ Expand on ancillary products content to include specific information on what makes Allsante products unique compared to the competition.
- ◆ Contact attendees where additional information was requested. The immediate follow-up aligns well with the perfect service initiative and illustrates that their feedback is important to Allsante
- ◆ Allow brokers to select the breakout sessions they want to attend.
- ◆ Consider including additional information on Allsante's incentive program.
- ◆ Distribute Survey Assessment to corporate and market leadership to review the impact of the program and implement recommended action.

- ◆ Communicate to the Allsante regional sales personnel a summary of results and an action plan.
- ◆ Communicate to the meeting participants (brokers) a summary of results and an action plan.
- ◆ In order to maintain and increase the level of response to the survey, continue the award incentive utilizing a drawing for respondents.
- ◆ The most effective way to measure change is to get a baseline measurement before a meeting. Consider developing a pre-meeting survey to attendees for future programs.
- ◆ Pay attention to the slight downward trend in Reaction and Satisfaction for these two markets.
- ◆ Implement a “re-energizing program” at the market level to keep Allsante top of mind with brokers. The program could be done via conference call or Web conference. Utilize the data in the assessment for topics that need to be addressed.
- ◆ Review comments regarding the Allsante Sales Executive. Recognize associates who are commented upon positively by brokers.

As above, the ROI evaluation isn't complete until actual sales of Allsante products by those who attended The Allsante Encounter event can be assessed and compared to total program cost. That is the focus of Phase Three of the research and the topic of Part Two of this case study, which will be published in March 2010.

## ACKNOWLEDGMENTS

The EEA and ROI of Engagement would like to acknowledge the kind support of the following organizations in underwriting the costs of this case study.

### Founders



### Founding Sponsors



### Premier Sponsors



### Gold Sponsors



### Educational Supporters



### Association and Media Sponsors



# APPENDIX A - ALLSANTE “ENCOUNTER”

## Program Overview

### Objectives

The Allsante Encounter for Georgia/Louisiana healthcare insurance brokers is designed to increase sales and profits in those specific geographic markets and to fully engage these channel partners with the company’s brand, products and personnel.

### Audience

The program included more than 50 key insurance owner/principal brokers, each of whom were individually selected and invited by Allsante. The delegates were representatives of large brokers who were already contracted with Allsante, but were not producing much business. In this manner, Allsante filled its event with brokers who had high potential to create greater sales. The program also included company sales personnel for the respective markets, including sales management, department heads, service personnel and key corporate leadership representatives

### Strategy

The meeting is intended to provide them with all of the skills, trust, confidence, relationships and motivation necessary to present, quote and successfully sell Allsante Inc. products. The event provided delegates with training, industry updates, relationship building and networking opportunities.

The ROI study will determine the all-inclusive expense of hosting these brokers, costs of special services, cost of implementation of the new tools and will then compare against the agents’ increased production and the net profits from new business.

## Agenda

### *Wednesday*

#### *2:00 p.m. / General Session*

- Introductions and welcome / Vice President of Sales
- Value proposition / President
- Tour with department presentations

#### *Breakout Sessions*

##### *General Session*

- What to expect tomorrow / Vice President of Sales

##### *5:45 p.m. / Dinner*

## **The ROI in Channel Partner Conferences: - A Two Part Case Study**



***Thursday***

***8:30 a.m. / Networking***

***9 to 11:50 a.m. / Breakout Sessions:***

***11:55 a.m. / Closing***

## APPENDIX B

### *ABOUT THE REPORT AUTHOR*

#### Allan Schweyer

Principal, Center for Human Capital Innovation  
Chairman, Enterprise Engagement Alliance



Allan Schweyer is a Principal in the Washington DC based firm Center for Human Capital Innovation, which provides strategic consulting services to government and military clients. Allan is also the Chairman of the Enterprise Engagement Alliance, a non-profit consortium of private and public sector organizations dedicated to improving employee, customer and stakeholder engagement in organizations.

Prior to CHCI, he was President and Executive Director of the Human Capital Institute. Trained as a labor market economist, Schweyer has contributed to the field for almost two decades. He is the author of two books, "Talent Management Systems" (Wiley & Sons, 2004) and "Talent Management Technologies" (HCI Press 2009). In 2009 he was recognized as among the "100 Most Influential People in HR and Talent Management". He is currently the editor of Leadership Excellence in Government Magazine and contributes to numerous industry publications.

Allan's contributions include the development of award-winning workforce management and information systems for government, NGOs and the private sector. In addition, he has many years experience as a senior researcher, analyst and consultant, servicing large private and public sector clients in their HR and Human Capital strategies. Allan speaks and presents worldwide and his articles and white papers appear in dozens of popular media and industry specific publications.

Allan graduated in Economics from the University of Windsor and attended Harvard University for two years in the Graduate Management School.

### *ABOUT THE STUDY AUTHOR*

#### Todd Hanson, CRP, CPIM

President and Founder  
Catalyst Performance Group, Inc. and ROI of Engagement



Todd offers 25 years of experience helping organizations achieve people performance goals. Todd began his career as an award winning sales representative for a global leader in agricultural chemicals. Later, he was a top performing sales executive, a manager of sales professionals and a key management executive and owner of a top ten performance improvement,

incentive and meeting planning provider with sales exceeding \$100,000,000. He now owns and manages Catalyst Performance Group and ROI of Engagement.

He brings personal experience in product launches, corporate reorganizations, marketing communications strategy and fulfillment, web-site strategy and development, sales and non-sales incentives, channel partner campaigns, medical symposia, training meetings, sales meetings, events, team-building programs, board meetings and technology solutions for events, awards and communications. His ability to develop holistic and integrated strategies coupled with an ability to understand the granular requirements for implementation have led to outstanding successes for clients.

He has attained two professional designations; CPIM, Certified Performance Improvement Manager and CRP, Certified Return on Investment Professional. Both require the acquisition of knowledge and the application of it to meet needs in the marketplace.

## *ABOUT ROI OF ENGAGEMENT*



The mission of ROI of Engagement™ is to help build the business case for engagement and in so doing, help businesses grow more profitably. Services include workshops, certification courses, webinars, keynote speaking, consulting and ROI evaluation. The initiative is led by Catalyst Performance Group, Inc. in partnership with The ROI Institute, and is supported by The Motivation Show and other partners to be announced in the near future.

The initiative utilizes ROI Methodology™ developed by The ROI Institute. Founded in 1992 by Drs. Jack and Patti Phillips, The ROI Institute has developed and refined a worldwide accepted method of measuring ROI. The system includes isolation techniques and strict guiding principles, all in an effort to create results measurement that is credible with C-Level executives. ROI Methodology™ is used to conduct literally thousands of studies each year in more than 50 countries. The ROI of Engagement model meets the specialized needs of engagement initiatives and helps companies confidently deploy programs knowing that they have credible ways to forecast and measure ROI. ROI of Engagement is the exclusive provider of ROI Methodology for engagement programs.

## *ABOUT ENTERPRISE ENGAGEMENT ALLIANCE*



The Enterprise Engagement Alliance (EEA) is a recently formed coalition of companies and associations dedicated to the concept that engagement is an enterprise-wide endeavor that “begins with people and ends with profitability.” The EEA’s primary mission is to support research, education and outreach that creates a better understanding of how organizations can make the connection

## **The ROI in Channel Partner Conferences: - A Two Part Case Study**

between engaging people in business and long-term financial performance. The EEA is founded on the premise that the engagement of all of an organization's key audiences – customers, distribution partners and employees – is a critical but often overlooked success factor for businesses.

The Enterprise Engagement Alliance was founded in 2008 by the Human Capital Institute, a 140,000-member organization dedicated to talent management; global business consultancy Peppers & Rogers Group and their independent publishing division, 1to1® Media; and Selling Communications, Inc., a provider of engagement marketing services, media and technology. The EEA website is live effective September 2009 at: [www.EnterpriseEngagement.org](http://www.EnterpriseEngagement.org)