



Yates Insurance Agency

Yates Insurance Agency all but eliminated last-minute client training.

Founded in 1946 by Mr. Dan Yates, Yates Insurance serves clients throughout the United States and is one of the largest privately held independent agencies and providers of contract surety bonds in the state of Georgia. The 115-person agency represents all major insurance carriers and also provides clients with commercial and personal insurance, as well as employee benefit products.

The training challenge

“We wanted to create training from scratch, automate it so we could scale down the time it took, while improving the quality - or at least keeping the quality the same.”

For years, the 70-plus-year-old company has been training employees and clients one-on-one. Together with his team, 20-year veteran Kevin Phillips, currently at the helm of the Information Technology & Training department, develops and customizes a training program for new hires based on the job position.

“Typically, this training takes between 25-40 classroom hours and covers everything from the culture of Yates, the location of scanners & printers and how to use the phone system, to more advanced items like using our customer relationship management system,” Kevin explains.

But after running the same type of training year after year (after year!), Kevin and his team were ready to make a change. The one-on-one training, while solid, had proved to be very time intensive and repetitive.

At the same time, they decided it was time to replace the customer relationship management system they had been using for the last 18 years. The CRM is their core application and every employee would need to be trained on how to use the new one.

“This was going to be a massive change for the company and a huge project for us (the IT team)”, says Kevin.

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Why Yates Insurance Agency chose TalentLMS



As a technical writer myself, I was extremely impressed. Absolutely superb documentation. ”

Referral? Nope. Recommendation? Uh-uh. Kevin found TalentLMS with the help (and luck) of a good ol' Google search. Kevin stayed because of the quality of our support articles.

It was through our knowledge base that Kevin was able to determine that TalentLMS would be very easy to use and had the flexibility that few, if any, other LMSs had.

Combine that with excellent pricing and Kevin was sold.

The results

Kevin and his team are still working on Yates University, the name of the platform that will house all of their courses.

“Every single position, every course path, for every employee, that’s how we’ll do our foundation training for the new product. We’ll offer supplemental instructor-led training for in-depth discussions and more advanced topics. But the foundation level will be delivered to all employees through the TalentLMS/Yates University portal.”

Kevin has already used TalentLMS for training clients and has been impressed with the outcome. He explains the challenge like this:

“We would offer that course [for clients] twice a month, and inevitably clients couldn’t make those particular times, and we would try to schedule one-off courses for a particular client. Our goal was to provide convenience and accessibility to our client base. But, as a result, each month you never really knew how much training time would be needed on that product.”

Sounds familiar? In addition to saving Kevin and his team a tremendous amount of time and all but eliminating last-minute calls for client training, TalentLMS has also cemented their experienced and expert reputation.

“Now we have a completely polished course that, I believe, has improved our image. The course is very professional, it’s got video, graphics and all of that. And it’s consistent training from one client to the next.”

But the most successful result of using TalentLMS has been about more than offering consistent training.

“We’re able to build on that training. If we need to add in a particular set of topics, we can do that by simply adding another module to a course, or even adding another course. So, we can let the LMS take care of the routine foundation training and we can build new courses for our advanced employees and clients.”

You can hear the enthusiasm in Kevin’s voice. It’s the voice of a person whose hands have finally been untied. He is now able to put all the ideas that have been knocking around his brain for so long into action.

*Interview with **Kevin Phillips***

CIO, Yates Insurance Agency