

Evaluating current state to enhance the sales process

Prudential's Individual Life Distribution wanted to provide its wholesaling team with the tools and systems to be more effective, whether in front of a prospect or via virtual support. Weber helped the team understand a current state day-in-the-life of a field sales representative and worked with cross-functional stakeholders to develop a roadmap of future state, digital enhancements, and plan for execution.

Weber Approach

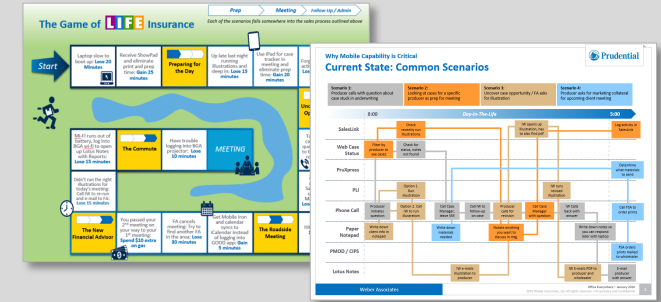
- Conducted physical and virtual ride-alongs with sales representatives to understand activities and pain points
- Facilitated workshops with cross-functional stakeholders to brainstorm future state tools and capabilities
- Collaborated with SME's across the organization to develop the future state road map and next steps

Keys to Success

- Cross-functional involvement to align current initiatives and understand the "bigger picture"
- Understanding of multiple roles (wholesalers, sales desk) to account for all future state considerations
- Engaging and visual content that drives deeper understanding for executive leadership to buy in and ultimately lead

Bring current state to life

Map current-state pain points and "bring it to life" to engage stakeholders



Design the future state

Brainstorm digital tools and capabilities and align with sales process



Plan for execution

Work with SMEs to develop execution road map and outline next steps

