



Pacific Life

SUMTOTAL® CUSTOMER SUCCESS

▶ THE COMPANY

Pacific Life, a leading provider of life insurance, individual annuities and mutual funds, has implemented a strategic compliance training initiative powered by SumTotal. As a result, the company has dramatically increased employee productivity, reducing training cycle time by 82%. The company also has been able to reallocate resources to other critical initiatives by realizing a 75% reduction in training expenses. Using SumTotal's robust reporting and notification features, Pacific Life has reduced administration and maintenance time for mandated training initiatives by more than 50%. These capabilities are providing greater visibility into real-time completion rates and employee learning data.

Founded in 1868, Pacific Life provides life insurance products, individual annuities, mutual funds, and offers a variety of investment products and services to individuals, businesses, and pension plans. Pacific Life currently counts more than half of the 100 largest U.S. companies as clients and is a member of IMSA (Insurance Marketplace Standards Association), whose membership promotes ethical market conduct for individual life insurance and annuities.

SumTotal[®]

STRONG TEAM, STRONG BUSINESS.

CASE STUDY

Pacific Life

▶ THE CHALLENGE

Summary of results:

- 82% reduction in compliance training cycle time is dramatically increasing employee productivity and customer service.
- 75% reduction in compliance training costs helps redirect resources to value-added activities.
- 100% company wide completion rate for compliance training initiative.
- SumTotal is managing more than 100 instructor-led and 400 online learning courses, including custom-developed and tailored off-the-shelf courses that serve all 2,900 employees across six divisions and several subsidiaries.
- SumTotal's robust reporting and alerting capabilities are reducing administration and maintenance for major training initiatives by more than 50%.

In 1997, the company launched the Pacific Life Academy, a “brick and mortar” corporate university that served its headquarters in Newport Beach, California. In addition to a wide variety of business skills and technology courses, the Academy delivered mandated instructor-led classroom training in areas such as harassment and confidential information.

Employees and managers were enthusiastic about the Academy, but the classroom delivery model made it difficult for field staff to participate and classes reduced employee productivity by interrupting their daily tasks. The cost and time to develop new mandated courses also hindered the Academy team's ability to create and introduce other business and technical courses to enrich employee skills and career development.

While the Academy grew, increasing regulatory complexity led to the creation of a new corporate

compliance department at Pacific Life. The new department turned to the team at Pacific Life Academy to help communicate the company-wide introduction of a new Code of Conduct and other critical compliance information and learning activities.

▶ THE SUMTOTAL SOLUTION

To meet the compliance training challenge, the Pacific Life Academy launched the eAcademy to add online learning to the mix of learning activities and to streamline learning management across the organization. Vice president Justine Milberg and program director Greg Cleveland wanted to create a comprehensive online learning environment to develop, deliver and track business, leadership development and technical skills training and measure the impact of that training on the company's business objectives.

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- Justine Milberg
VP, Pacific Life eAcademy

processes, business goals, product offerings and management development priorities,” said Milberg.

“We were eager to bring enterprise-wide learning technology into the company to ensure the success of the compliance training initiative.”

After an exhaustive search, Pacific Life selected the SumTotal Enterprise Suite as the platform for the new eAcademy.

clearly the best choice based on its flexibility, scalability and reporting power.

“The Academy and Corporate Compliance departments worked with SumTotal and its partner, VitesseLearning, to develop eight 30-minute online courses that introduced Pacific Life’s Code of Conduct. The courses, built around the theme, “It’s My Responsibility,” begin with a personal message from CEO Thomas Sutton, who welcomes users to the new module by reiterating the company’s top-down commitment to honesty and ethical conduct as building blocks for its

success. To enhance the learning experience, the interactive courses feature employee photos, matching exercises and audio cues.

“ SumTotal was clearly the best choice based on its flexibility, scalability and reporting power. ”

- Justine Milberg
VP, Pacific Life eAcademy

“SumTotal and VitesseLearning helped us address one of our biggest challenges: building 100-percent custom content that was PL-centric,” Cleveland noted.

During the compliance training rollout, the Academy team used the platform’s reporting features to track results for corporate compliance, share data with employees and highlight each division’s progress in completing the compliance curriculum. These reports provided executives with real-time visibility into training progress to accurately assess their division’s commitment to

implementing the Code of Conduct. This open approach to communications inspired greater teamwork and a healthy competitive culture that led to outstanding adoption and completion rates.

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- Justine Milberg
VP, Pacific Life eAcademy

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In addition to the compliance curricula, the eAcademy course catalog includes courseware on business skills (i.e. capital markets, finance, customer service, project management, sales and Six Sigma quality assurance), management and leadership development, desktop software applications and technology training.

According to Cleveland, each learning activity is tied to one of the company's business goals.

▶ THE RESULTS

82% reduction in training cycle time, increasing employee productivity and allowing representatives to dedicate more time to serving clients. 75% reduction in training costs, allowing reallocation of resources to other critical business initiatives. Greater than 50% reduction in administration and maintenance time for mandated training initiatives.

100% company-wide completion rate for compliance training initiative. Since standardizing on the SumTotal platform, Pacific Life has condensed 19 hours of mandated classroom time per employee into just 3.5 hours – an 82% reduction in training delivery time. The company uses the system to manage more than 100 instructor-led and 400 online learning courses, including custom-developed and tailored off-the-shelf courses that serve 2,900 employees across six divisions and several subsidiaries.

By delivering mandated courses at 25% of the cost of traditional classroom-

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based training, the SumTotal system enables Pacific Life to refocus its resources on other critical learning initiatives, such as acquiring and customizing a broader range of off-the-shelf courses and bringing more learning resources online for its divisions and subsidiaries.

SumTotal's reporting and notification features have streamlined learning program administration and maintenance by automating enrollments, generating course reminders, and tracking the completion of learning activities.

These capabilities have helped the company reduce administration and maintenance time for mandated training initiatives by more than 50%.

The compliance training project has achieved remarkable success. According to Milberg, the company achieved 100% completion on each of the mandated online courses.

“The ease of use of the system and quality of training content were extremely

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well received by our users. We were very pleased that they embraced online learning and adopted it so quickly, as that ensured our high completion rates," she said.

Based on the success of the compliance training initiative, Pacific Life has launched several new initiatives to increase the awareness and availability of online learning across the company. For example, Pacific Life is using SumTotal to deploy a blended orientation program to new employees across the country. To keep pace with growing demand for e-learning across the company, the Academy team is also exploring new ways to support product launches and other mission-critical initiatives. The company is also looking at how to educate users about the advanced features of TotalLMS to help them create their own proactive learning plans and track personal learning activities.

Milberg and Cleveland added, "SumTotal offered Pacific Life a solution custom-tailored to our unique needs and it paid for itself in the first year after we implemented. Right now, we're just scratching the surface of what the solution can do and the results we achieved this past year are just the beginning."

For more information, please contact us at +1 650 934 9500, or toll-free at +1 866 768 6825, or via email at sales@sumtotalsystems.com.

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