



iPipeline makes training and onboarding processes more effective and efficient with Showpad Coach

HQ Exton, PA
Founded 1995
Industry IT solutions for life insurance and financial services companies
Employees About 600

Snapshot

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About iPipeline

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iPipeline streamlines training with Showpad Coach

Rich Grisham faced a problem familiar to most sales operations managers: getting his salespeople in the same room at the same time for training and demos was almost impossible. Schedules were difficult. And closing deals took priority. "Even with the best intentions, it just got to be very challenging," says Grisham, Associate Vice President of Sales Operations and Engineering at iPipeline, the leading provider of cloud-based software for the life insurance and financial services industry.

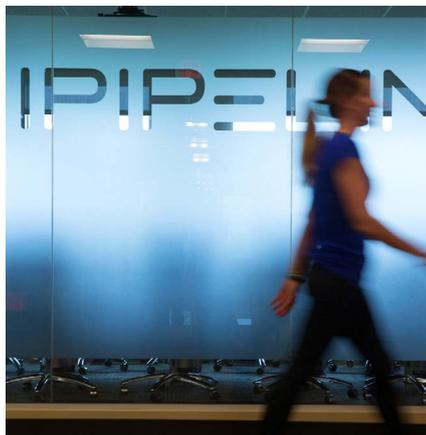
iPipeline is in growth mode and recently acquired multiple companies. With each acquisition came new salespeople, new products, and new sales approaches. Grisham now has 40 sales team members around the country and that number is growing steadily.

With a dispersed sales force, rapidly growing company, and scheduling challenges, Grisham had to find a more effective and efficient way to train his sales team. He had a C-suite mandate, too. The company's new president wanted a much more formal sales training and certification process in place.

After a demo of LearnCore, now known as Showpad Coach, Grisham felt it would solve many challenges for his team. But he needed executive buy in to close the deal, so he invited the president to a second demo. "Within five minutes of seeing it he said 'We're good.' Having that executive support is huge," he notes.

"With Showpad Coach, people get a lot more when they show up as a new salesperson than they ever would have before."

— **Rich Grisham**
Associate Vice President
of Sales Operations and
Engineering at iPipeline



Before using Showpad Coach, Grisham's team shared training the way many companies do. They created training content, got it approved, and emailed it to the salespeople who would have a month to study it. The sales team would be invited to a meeting where they'd deliver a live demo to a group of managers who would evaluate their sales pitches. Grisham's team would manually track who completed the training and who didn't. It was time consuming, the live presentations weren't popular with the salespeople, and scheduling was a constant challenge.

Showpad Coach streamlines the process and reduces the stress of scheduling and presenting. "If I were to sum it up, Showpad Coach fixed a broken process here at our company," says Grisham.

Now his team produces the content and loads it to the platform so salespeople can complete the training on their own schedule. When they're ready, salespeople record their demos for evaluation using Showpad Coach's Pitch IQ tool. Managers can watch the demos and give feedback when it's convenient.

"Not only does Showpad Coach solve the problem of trying to get everyone in the same room for the day," explains Grisham, "but it also gave us the ability to record and grade a product pitch and create a simple certification process." And if Grisham needs to update a training element, it's easy to do in Showpad Coach. There's no need to email a new file because the content in the platform is always up to date. Adding a short test for certification to a course is quick, too.

iPipeline is seeing measurable results with Showpad Coach. The sales team is expected to complete one product level training and two certifications each quarter. Grisham reports training completion rates above 90% and shares those numbers with the company's board. He's also using Showpad Coach to track those quarterly training requirements. "With Showpad Coach we don't have to track that manually or wonder whether someone did the training or not," says

Grisham. "We grab the data in Showpad Coach and report it right to the board. Being able to do that quickly a few times a quarter has been extremely helpful."

Because Grisham and his team are producing all their training content in Showpad Coach, they also have a more effective onboarding process for new salespeople. "Now our new salespeople just go through the training, certification, and pitches in Showpad Coach," says Grisham. "With Showpad Coach we get a clearer picture of how our new salespeople are doing much earlier on and we're putting them in a much better position to know what iPipeline does and what our products do."

Grisham expects that iPipeline will expand its use of Showpad Coach around the company. "We are big fans of Showpad Coach!" he says. "It not only did exactly what was promised – it does even more and we appreciate that."

"Showpad Coach has been even more helpful than we were initially expecting."

— **Rich Grisham**
Associate Vice President
of Sales Operations and
Engineering at iPipeline