



Hexure **Quadruples** **Client Training** **Program**, Improves Internal SOP Training with Tovuti



Summary

Hexure, an end-to-end software platform, was looking to expand its client training program and create a new internal training program. Hexure was using an LMS, but the platform couldn't support training for both internal and external audiences at the same time.

Additionally, the platform couldn't scale the large amount of content Hexure planned on building for both programs.

Hexure realized that it needed a new LMS and selected Tovuti for checking the most boxes on its list of requirements.

Since implementing Tovuti, Hexure:

- Quadrupled its client training program and has encouraged repeat visits
- Improved internal job consistency, processes, and SOPs
- Scaled its content to over 100 courses, including simulation-based training
- Supports internal and external training – all from one platform
- Saves significant time every year with account mapping and workflow automation

About Hexure

Hexure is a technology company that provides digital sales automation solutions to the insurance, financial services, and wealth management industries. Through end-to-end software, Hexure helps insurance carriers and distributors deliver customer-centric sales experiences, reduce paper sales processing, create better digital workflows, meet regulatory requirements, increase speed to issuance, and improve in-good-order sales.

The challenge

Hexure started a certification program to train external clients on its software solutions. But it soon found that its needs were growing. In addition to training in-house platform administrators, Hexure realized they needed more internal training to better support client needs.

Hexure was already using a learning management system (LMS) to facilitate its external certification training program. However, the LMS couldn't support an internal learning and development program simultaneously.

The platform also wasn't easily scalable for the amount of content they were planning to build. Current users were already having a difficult time finding what they needed and navigating courses in their current system.



Hexure selects Tovuti for “checking the most boxes”

Hexure knew they needed a more robust LMS and began looking at several platforms. They created a list of deal breakers, must-haves, and nice-to-haves. Topping that list was a platform that could support two separate training programs for both external and internal users but was easily manageable from the admin side.

“We kept track of who had what options and features available – the ease of use for our users but also the lift that would be required from our team,” said Valerie Guerin, Senior Instructional Designer at Hexure. “And Tovuti checked more boxes than the rest.”



Tovuti helps get training up and running fast

With impending licensing fees looming on their old LMS, Hexure had a tight timeline to migrate its training program. Using SCORM, they were able to shift their entire external training program to Tovuti and began training clients around six weeks post-purchase.

“The ability to move that quickly was really beneficial for us--helping to get off our old platform before the deadline and avoid additional licensing fees,” said Allison King, SVP of Strategic Advisory Services at Hexure.

Hexure rolled out its employee training to internal teams soon after. Using Tovuti’s built-in course authoring tools, Guerin and team quickly built courses and lessons with interactive content and events. Within a month, they were in pilot.

“It was so much easier to build courses in Tovuti than what we had before,” said Guerin. “The transition to Tovuti was really nice.”

Hexure builds SOP, process documentation, and job-specific training

Hexure’s main objective with internal training is to create consistency in how employees conduct their day-to-day work, particularly in their client delivery department. The majority of their internal training focuses on role-specific duties, process documentation, and standard operating procedures (SOPs). Hexure also includes a required onboarding program for new hires.

Courses include step-by-step breakdowns for tasks and job processes. Hexure then implements interactive quiz content like flip cards to help employees practice what they’ve learned.

Hexure also regularly releases training initiatives that keep employees up to date on new processes, templates, and workflows. Rollouts can be company-wide, where employees must complete coursework and attend internal events by a specific day. Or, courses may be skill-specific, where only certain employees must complete training.

“Our users love how polished Tovuti feels,” said Guerin. “They really, really like the navigation of it. It’s been an overwhelmingly positive reception when it comes to ease of use.”

Media library increases organizational efficiency

Hexure rebranded the Tovuti media library to a “resource library,” which they use to house hundreds of internal SOP process documents. Previously, Hexure had been using SharePoint to accommodate process documents, but it was nearly impossible for their employees to find what they needed.

Guerin built out keywords for each media item, making it easily searchable for their teams. When employees have questions about a certain process, they can type in the keyword and quickly find their answer – without having to sift through unrelated content and knowing they have the newest version of a document.

“Our internal users have really adopted the media library,” Guerin said. “They love always having easy access to SOP documentation and not having to hunt for information.”





Tovuti helps quadruple client training program, increases repeat visits

In addition to internal process training, Hexure also offers an external client training program to train in-house administrators on its software platforms. Courses cover everything from day-to-day administration to platform configuration, ranging from short “just-in-time” training to long-form content.

Many of its courses are simulation-based to show admins how to perform actions within the software. Because these topics are highly technical in nature, Hexure uses virtual classrooms to host live instructor-led sessions that allow for deeper hands-on lessons.

To build these courses, Hexure uses both SCORM video files created with Camtasia or Captivate and built-in Tovuti course authoring tools. The ease of creating content and user navigation has been key to helping their client program grow.

With Hexure’s previous LMS, users would often get lost in the platform or frustrated with the unintuitive interface. Since implementing Tovuti, Hexure’s client training program has nearly quadrupled in the number of users.

*“Tovuti has really helped us dig in and provide more to our clients,” Guerin.
“With the ease of creating content and rapid building, we’re able to offer our users more, which helps keep them coming back. We don’t have users that just log in once and say, ‘I took it, I’m done.’”*

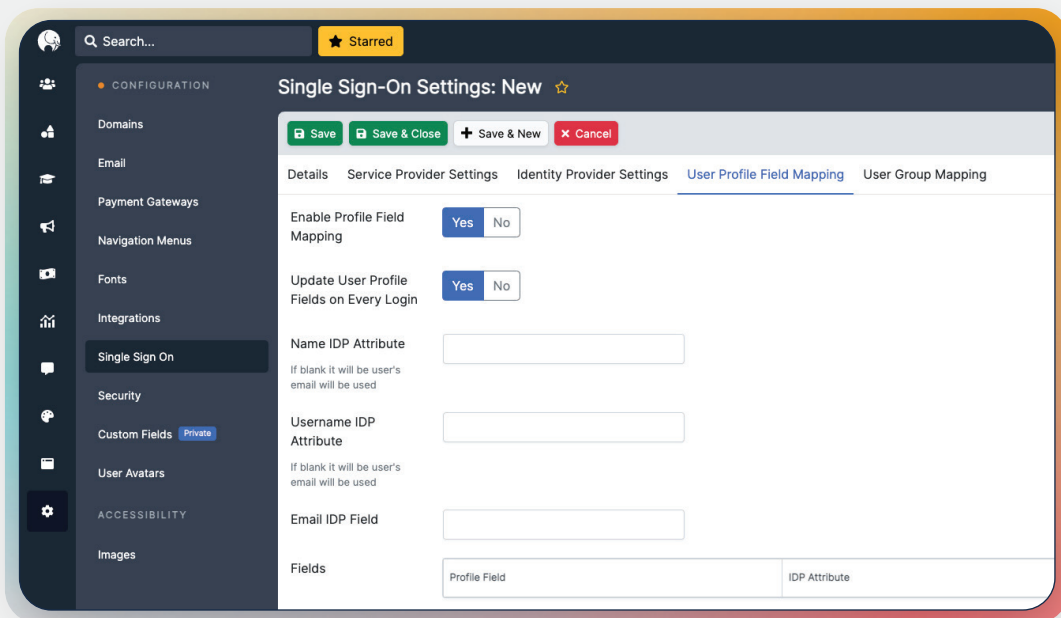
User profile mapping leads to significant time savings

Hexure packages their external client training as paid subscription plans. A basic subscription plan gives administrators access to a few courses. An enhanced plan provides more advanced training. And premium includes a certification on the platform that can be added to the learner's LinkedIn profile.

Tovuti has provided Hexure with the capability to efficiently package their training offerings, to reach their learners in targeted ways through subscriptions. The subscription plan is sold on the sales side, but content and learners are easily managed with Tovuti.

With Tovuti's user profile mapping, the process is automated. Once an administrator purchases a plan, they self-register an account and are automatically added to a plan based on the information they provide.

"We've saved so much time with automation," said Guerin. "We don't have to worry about managing usernames or passwords. We don't have to constantly look at everyone's profile and manually add them. It's just so much easier to manage the user with Tovuti."



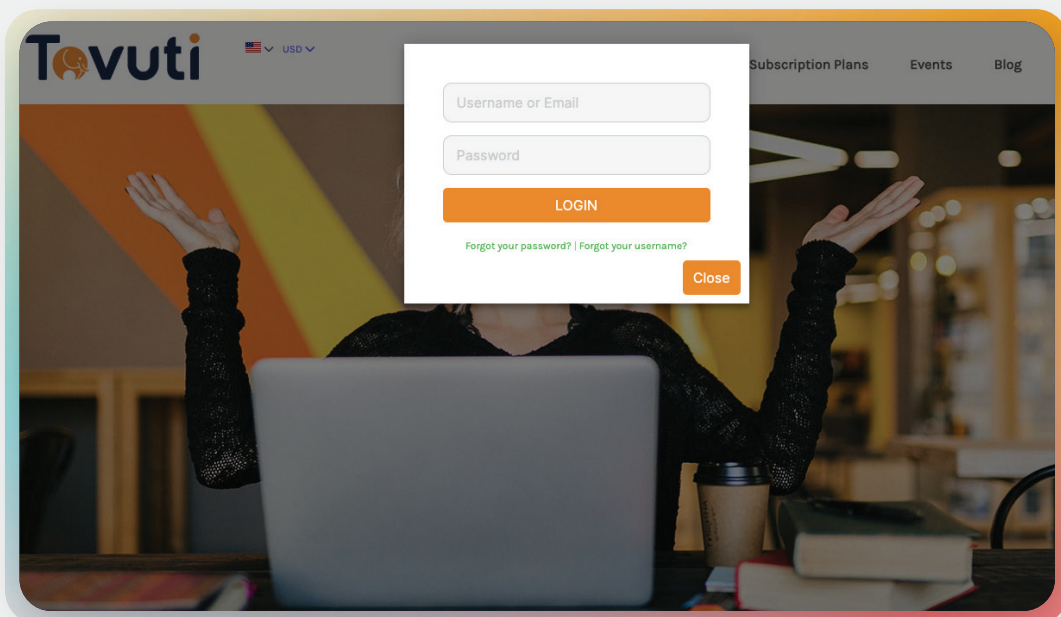
SSO and milestones help with learner pacing and technical topics

Similarly, Guerin uses single-sign-on (SSO) and milestones to automate workflows. Based on a user's SSO input, they can be automatically added to a workflow. The workflow releases content as the user passes certain milestones – something that is especially important for Hexure, as most of its topics are highly technical.

For example, a user may need to attend an event before certain courses are unlocked or vice versa. These different workflows help to manage the pace of content for users, ensuring that they have access to content only when they're ready.

"In a classroom, you can monitor the pace of your students," said Guerin. "You can say, 'Whoa, we've got to slow down because no one's understanding this, or we've got to speed up because everyone's really getting it.' With milestones and these workflows, we're able to replicate that same kind of pacing."

SSO also helps Guerin speed up content duplication. Through SSO, users are automatically added to either an external or internal learner bucket. If Guerin has a course that both groups need access to, all she has to do is select the group. There's no need to recreate the course or even duplicate it.



The results

Hexure's client training program has grown rapidly, nearly quadrupling since switching to Tovuti. Ease-of-use has also encouraged repeat user visits. Guerin and team plan to build more training that dives deeper into topics to help meet this demand.

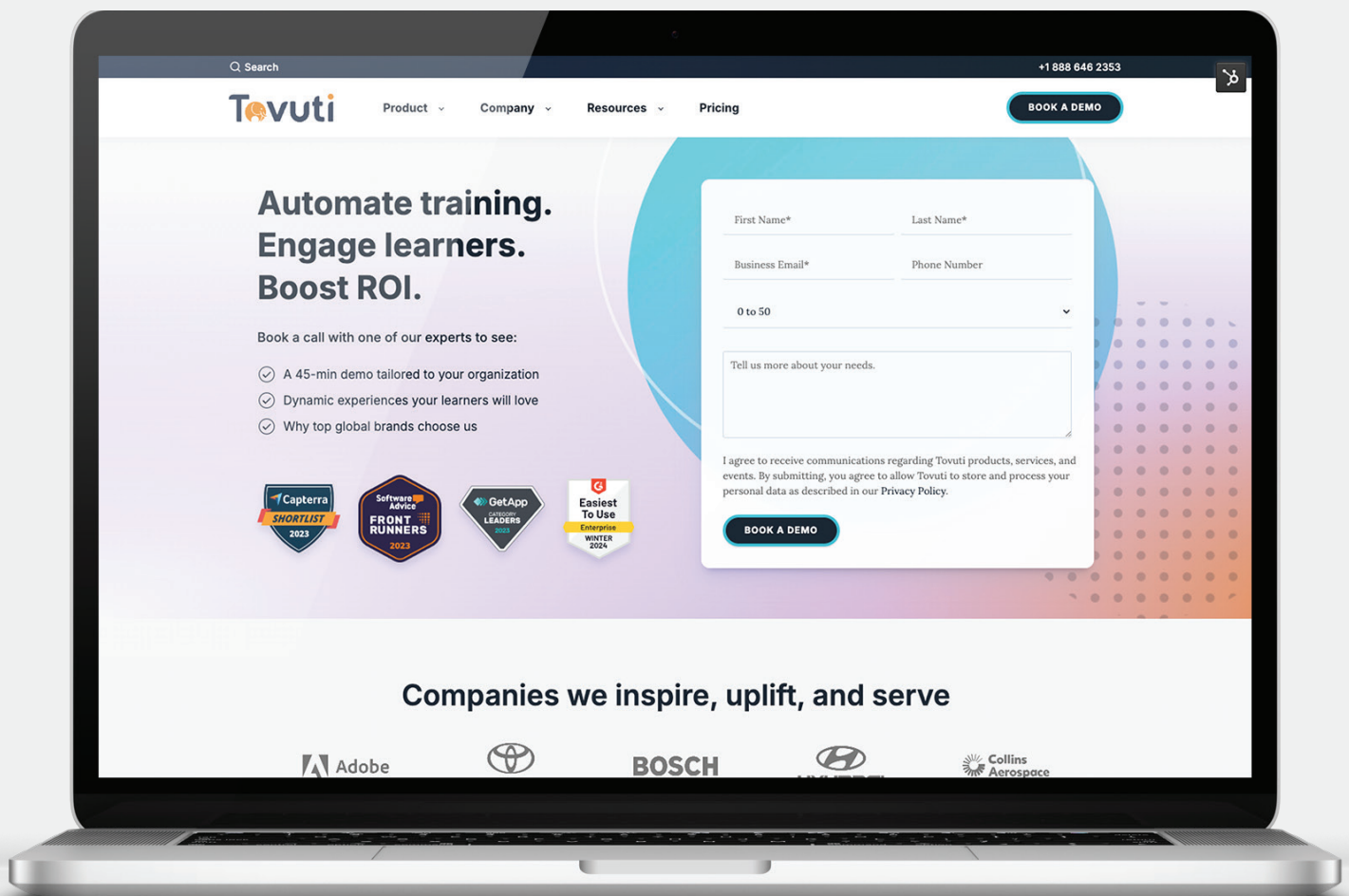
Hexure also built out its internal training program, helping increase job consistency, process documentation, and SOPs. It saved a significant amount of time and money by automating workflows and creating a knowledge base within the Tovuti platform. Internal employees use the resource library as a quick reference center – something not possible with previous tools.

Between both programs, Hexure has scaled its content to include over 100 interactive courses, events, and simulation-based training – with plans of expanding even more.

“Being able to customize and automate has really allowed us to grow in so many ways,” said Guerin. “We don’t feel like we are pigeonholed or have to go in one specific direction. Tovuti is very flexible based on our needs. We can be really nimble and create learning content that we need or change a workflow. And it’s not a huge lift.”

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