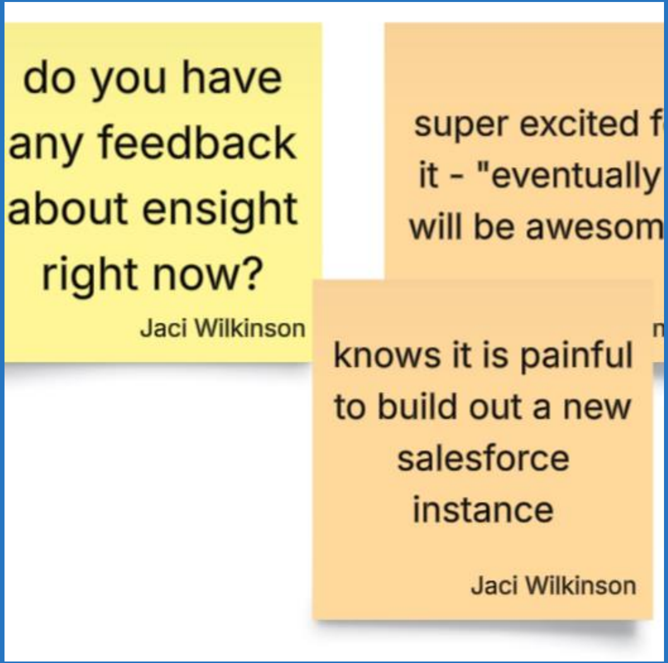
Homesteaders Life Company

Helping People Design a Better Farewell

Driving Ensight Adoption & Optimization



Jaci Wilkinson, Sr. UX/UI Designer

6/11/26

This is a **summary** of findings and recommendations from user research conducted with 23 Account Executives. [Read the full report.]

Executive Summary

Theme #1: Revise the Ensight opportunity pipeline.

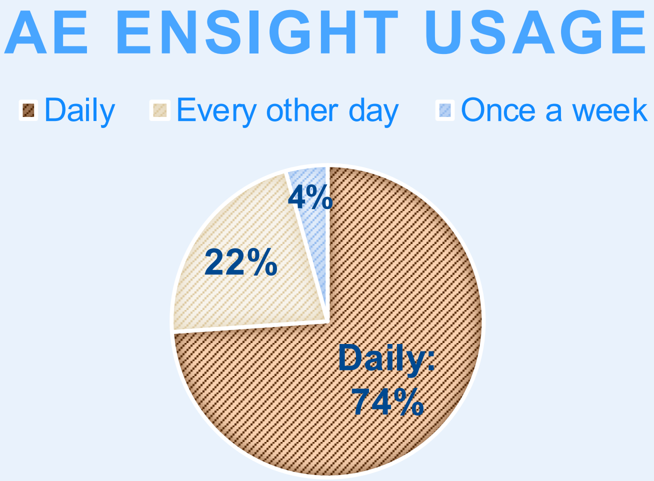
Theme #2: Re-envision the Ensight task flow.

Theme #3: Improve communication & “just in time” support.

Theme #4: Help AEs showcase the value of their day-to-day.

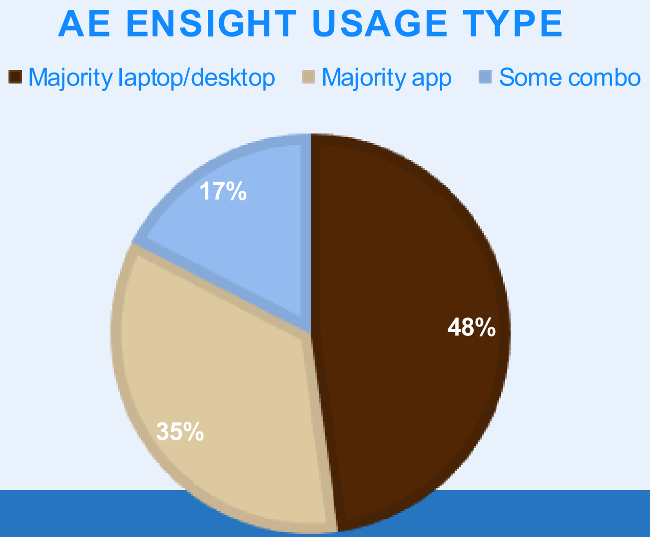
Theme #5: Hold off on Ensight Maps changes for the time being.

How are AEs using Ensight?

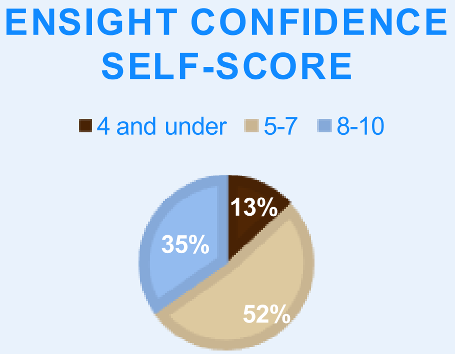


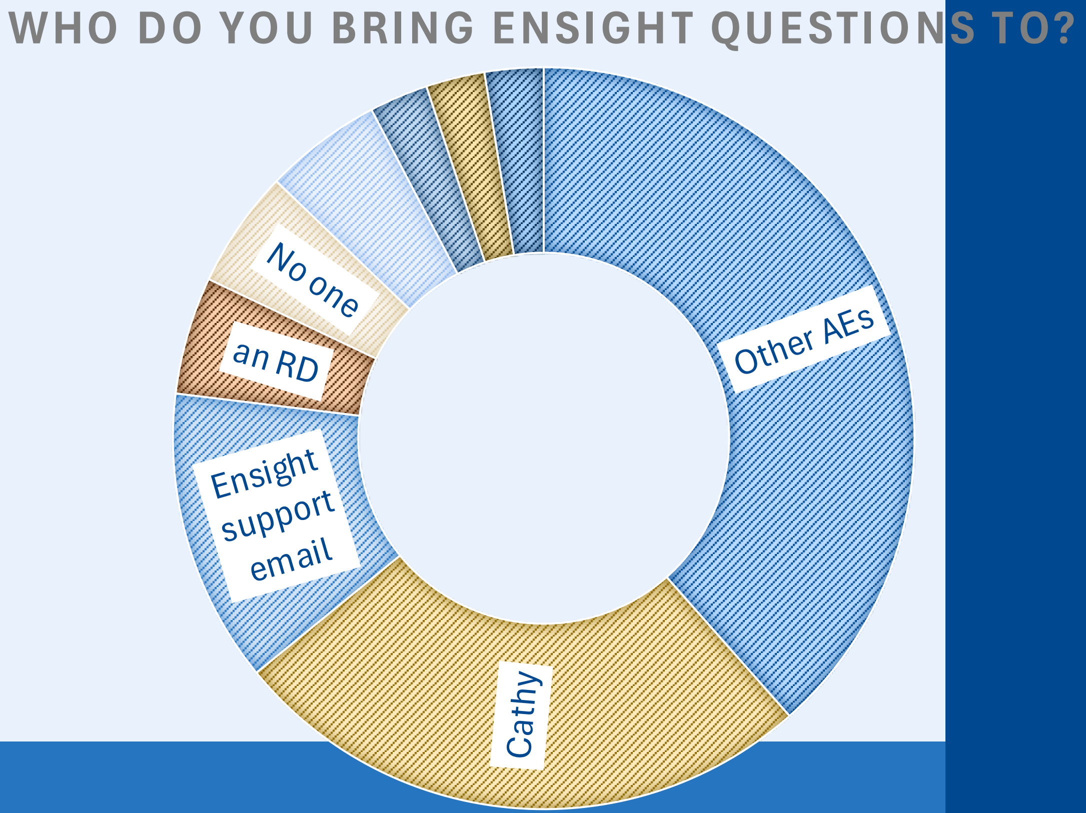
This is a good sign! Folks are inside Ensight doing things.

This is surprising. Even though AEs have a work-provided ipad, 65% of them use Ensight on an ipad or phone 30% of the time or less. **There is an opportunity to show the value of using Ensight on their ipad/smart phone to support their work.**



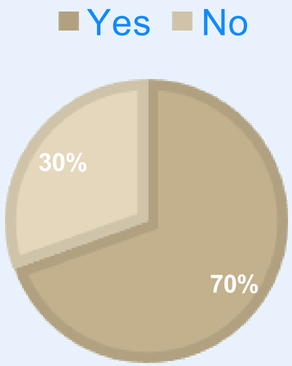
Ensight confidence & getting help



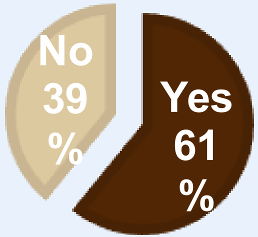


Are AEs using Ensight as intended?

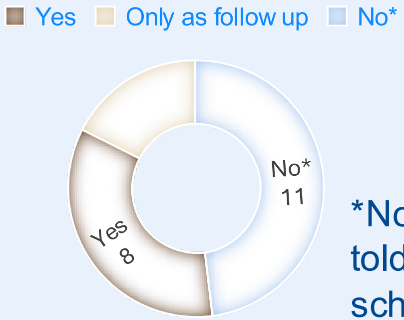
CLOSED AN OPPORTUNITY YET?



USING MAPS?



CAN THE AE ACCURATELY SCHEDULE A TASK?



*No includes AEs who told me they don’t schedule tasks.

Theme #1: Revise the Ensight opportunity pipeline to better match Account Executive behavior, capture better data, & improve the funeral home account user experience.

1. AEs have trouble distinguishing between the current “targeting” and “discovery” phases and don’t think they participate in “negotiation” at all.
2. Half of AEs don’t close an opportunity until the first policy is written.
3. When asked about the value the opportunity provides to them, AEs appreciate the focus that the opportunity structure provides so that they can give special attention on 3-5 prospects and distinguish that attention from their prospecting behaviors.
4. AEs mentioned wanting more guidance and structure to help them understand how and when to move through each opportunity stage but also less overall stages to work through.
5. Inefficient, slow workflows in the Licensing and Compensation department were cited as a bad first impression for new clients and significant pain point.

Theme #1 Deep Dive

When asked how it long it takes between "winning" the opportunity and signing the first policy, most AEs explained that it depends heavily on if the account is already selling preneed or has a licensed, dedicated/roving agent (as opposed to a funeral home employee who has other duties as well). Won opportunities with accounts who need to do licensing and extensive preneed training take on **average 1-2 months longer to write their first policy** than an account that already has some level of licensure and preneed familiarity/experience.

A lot of this lag has to do with the account's agent or decision-maker having **confidence** about selling the product.

"It's a comfort thing. If they (the funeral home) are not comfortable with our systems, they won't use them in front of a family because they don't want to look foolish."

Participant #11

Theme #1 Recommendations

1. “Gatekeep” every stage of the opportunity so that certain information needs to be entered before an AE can move on to the next stage. Don’t allow manual stage movement. (AEs will still be able to close/defer an opportunity at any point in the process).
2. Capture strategic data to trigger each new stage that will provide better opportunity visibility to Sales Leadership. For example, capturing information about if the funeral home account in question has sold preneed before or has licensing will help the AE know how to predict the opportunity pipeline duration and how much support to give the account.

3. Add the licensing and onboarding stages to the pipeline so that an opportunity is not closed until the first policy is written.

4. Define specific prospecting activities that AEs should be conducting with prospects who are **outside** of the opportunity pipeline to help contrast with what they should be doing during the opportunity pipeline.

Theme #1

Summary of revised pipeline stages. View full revised opportunity pipeline on LucidChart.

Discovery

AE collects all the data he/she needs to tailor the best possible proposal.

Presenting

AE presents proposal, logs in Ensight what materials he/she presented, and marks if result is lost or won.

Licensing

If won, the AE logs who will be writing, what product(s) were selected, enters agent IDs, & schedules onboarding/training. Helps set up logins/access to HLC systems.

Onboarding

AE conducts onboarding/training & coaches funeral home to first policy. The opportunity automatically closes after the first policy comes in from LifePro.

Theme #2: Re-envision the task functionalities ("Activities") to improve consistency of use and better measure AE performance.

1. 47% of AEs don't know how or chose not to schedule a task.
2. There is widespread confusion about the difference between "Schedule a task" and "Log an Outreach" which are currently two separate ways to create a task object in Ensight.
3. Eight AEs said one of their most frequent activities in Ensight was "logging notes", "taking notes", or "notetaking" but there is no "note" object in Ensight. The only notes someone can take are in relation to a task or using the Comments field in an opportunity or funeral home account.
4. AEs' primary task activity is reaching out to a prospect or current account.
5. Few AEs understand the functionality of scheduling an event or using the Salesforce calendar.
6. Zero AEs add activities to the opportunity unless they are duplicating that activity in the funeral home account even though most mentioned that they have been trained to do so.

Theme #2 Recommendations

1. Combine “Schedule a task” and “Log an Outreach” into one task flow called “Schedule an Outreach Task”. Allow the AE to schedule it into the future, back date it, or time stamp it with the current date/time. When resolving/completing an outreach task, allow users to log how long they spent on that particular outreach. View flow recommendation in LucidChart.

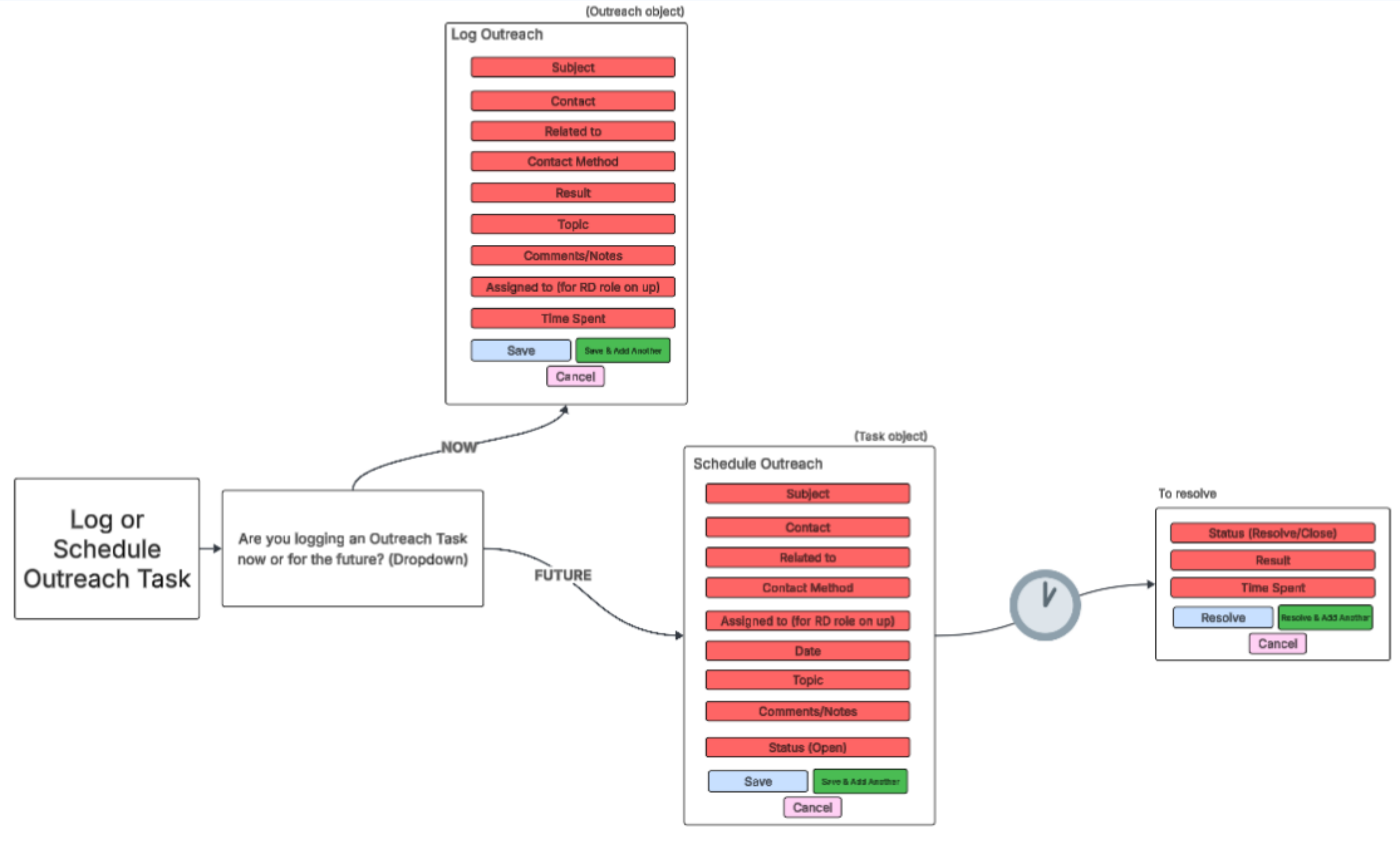
2. Provide revised guidance about what information should be put inside Ensight. Instead of “If it’s not in Ensight it didn’t happen”, focus on logging outreach that drives valuable business insights. Here’s a proposed decision tree that could be inserted into the user guide to help Ensight users distinguish **their everyday notetaking** from what they put in Ensight.

3. Move Opportunities from the tab section on the funeral home account page and replace it with the current placement of “Related Contacts” or “Branches” on the right-hand side. This way it will be directly above the Activity/Activity History feed.

4. There is a way for tasks to show up on an opportunity activity history and a funeral home account activity history without duplicating task data. Leverage the “Related to” field to the new task flow to ensure this happens.

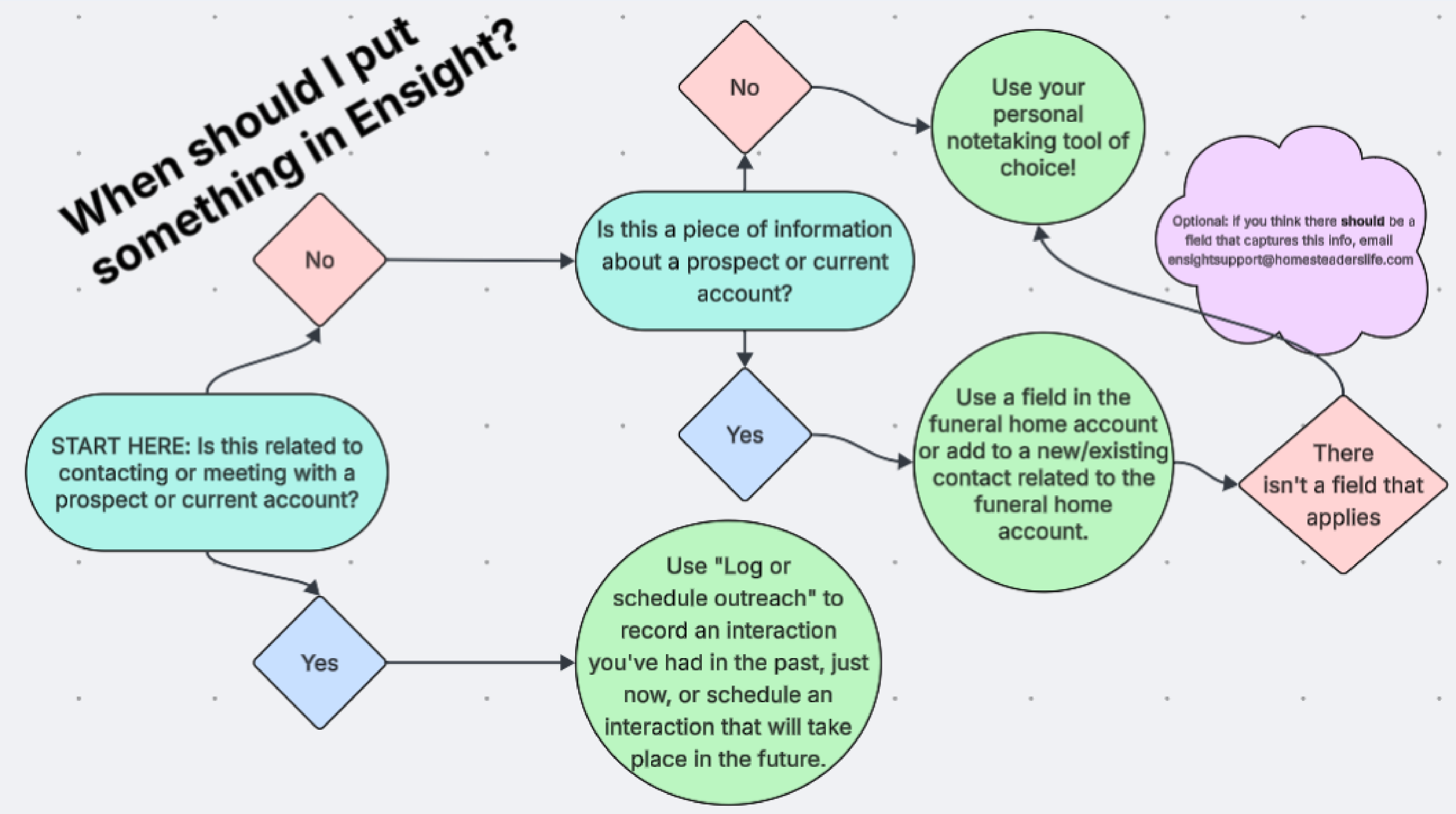
Revised task object flow

[View full diagram]



Ensight usage decision tree

[View full diagram]



Theme #3: Improve communication & “just in time” support by curating a thoughtful Microsoft Teams community for AEs.

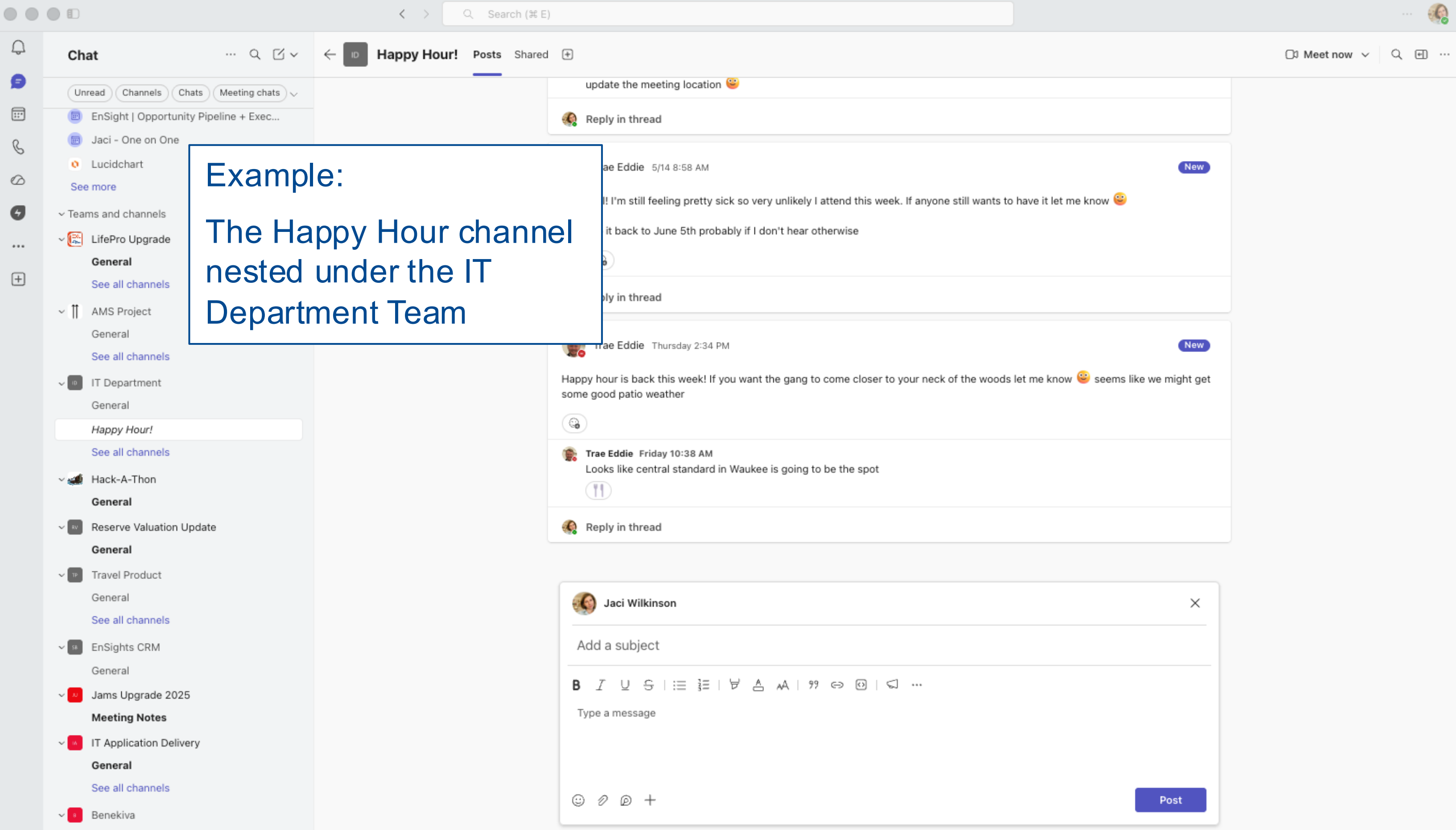
1. Most AEs reach out to the same 1-3 AEs for questions about using Ensight. These AEs do not have Ensight support written into their position description. This has likely created an “echo chamber” where misinformation easily and unintentionally spreads.
2. Despite some confusion and frustration expressed regarding the Ensight roll out thus far, there is overwhelming grace and positive anticipation from AEs for what Ensight will become.
3. AEs have major trust issues with Ensight. 20% of interviewees mentioned not trusting the information/data inside Ensight and often used that lack of trust to justify their limited usage of Ensight.
4. There is currently no “owner” of Ensight communications and no vehicle for sharing Ensight changes from the product team or Leadership with the user community.

Theme #3 Recommendations

1. Offer quarterly working sessions where AEs remotely co-work on a call and knock out housekeeping/administrative tasks they have trouble making time for like creating new contacts.
2. Create an Account Executive-focused Microsoft Team and nest an Ensight channel underneath it.
3. Offer on-demand Ensight support via the Ensight channel chat that is loosely monitored by someone who can triage and escalate issues during business hours. This way AEs have direct access to each other but also the staff that maintain Ensight.
4. Assign an “owner” of communications regarding Ensight. This person will be responsible for standing up and sending out regular communication about Ensight updates.

Example:

The Happy Hour channel nested under the IT Department Team



Theme #4: Help AEs showcase the value of their day-to-day work

1. Ten interviewed AEs expressed concern that Ensight doesn't show how they manage their time and the want to better show leadership the value of their day-to-day activities.
2. Three interviewed AEs specifically mentioned that it is hard to log the amount of time they spend doing training, onboarding, and customer support with agents and funeral home employees especially during evening/weekend hours when HLC customer support isn't available.
3. Zero interviewed AEs could accurately describe why they had a large number showing red on the AE dashboard or how to change it from red to green. Despite universal confusion and low trust over these numbers, a majority of interviewees mentioned consulting them throughout the week.
4. Nine interviewed AEs mentioned fatigue, frustration, or confusion about toggling between UIS, Ensight, and PowerBI, especially when multi-factor authentication is required.

Theme #4 Recommendations

1. Remove the 4 large numbers from the AE Dashboard until they can be fixed to display what the goal number should be and at what point it is green, yellow, or red. Also put these metric expectations in the User Guide including how they are calculated in relation to the # of company holidays and personal vacation/sick days a user takes.

3. Continue exploring ways to consolidate the tools required for AEs to access data. Specifically, how PowerBI data or visualizations could be embedded directly into Ensight or UIS so that AEs don't need to separately navigate to PowerBI.

4. Only show Mains on the At-Risk Account table in Ensight.

Theme #5: Hold off on Maps changes for the time being

1. Half of the Home Office AEs interviewed use Salesforce Maps even though it is not for their own travel.
2. None of the interviewed AEs use Salesforce Maps for step-by-step navigation nor do they use the built-in Routes or Schedules feature.
3. Five AEs use Maps to help agents or marketers discover prospective funeral homes to work with or visit.
4. Eight AEs emphasized the importance of not having fixed routes or schedules because of the flexibility they need to adjust. Often appointments will cancel due to unplanned events like a death.
5. Conversely, five AEs explicitly mentioned **having** set routes that they cycle through.
6. 26%, of AEs interviewed mentioned only using Salesforce Maps on their desktop/laptop to plan routes ahead of time or help a partner (a marketer or roving agent) identify prospect locations in their vicinity.

Theme #5 Recommendations

1. Remove branches from default All Accounts view in Maps.
2. Some Sales Leadership have described having the expectation that AEs will navigate to precise schedules and manually-updated routes so that Leadership can see exactly where all AEs go when they are on the road. AEs are a very long way from this uniformity of use. Regroup Sales Leadership to discuss what type of location/geographic data is most important to collect and why.

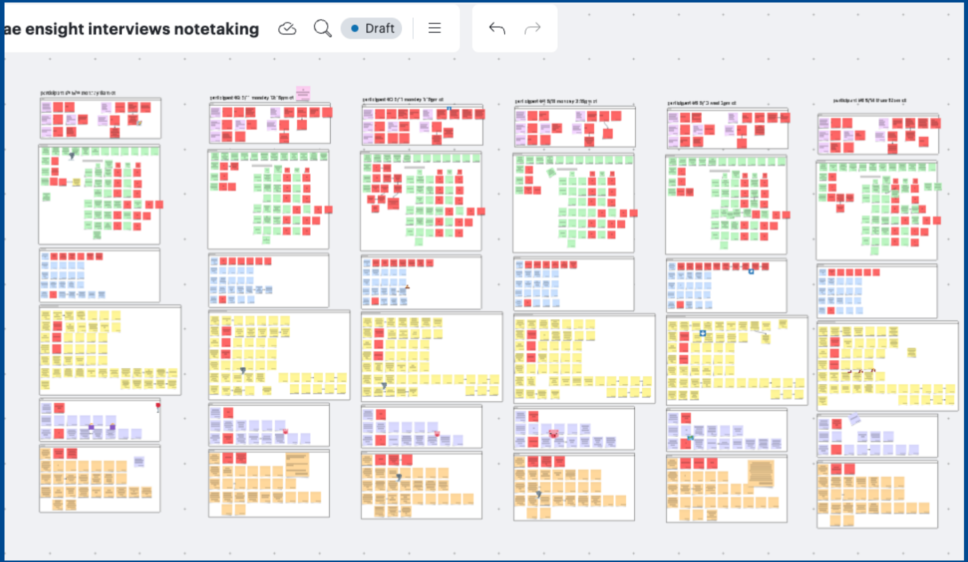
3. At a planned gathering where all AEs will be in attendance, run a training or demo where all AEs must bring their company iPads to ensure the Salesforce Maps application is installed and working properly on all devices. Consider doing this at regularly scheduled gatherings to ensure consistent technical support and iPad usage over time.

4. Focus on implementing the other recommendations in this document first before iterating on Maps' functionality.

Next Steps

Thank you!

This deck only summarizes my findings and recommendations. Leadership needs to review, give feedback, and ultimately approve the recommendations outlined in the official report.



Folks are also welcome to browse my full anonymized interview notes

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