

# 2007 NAILBA MEMBER April Survey

Technology Implementation Team

June 2007



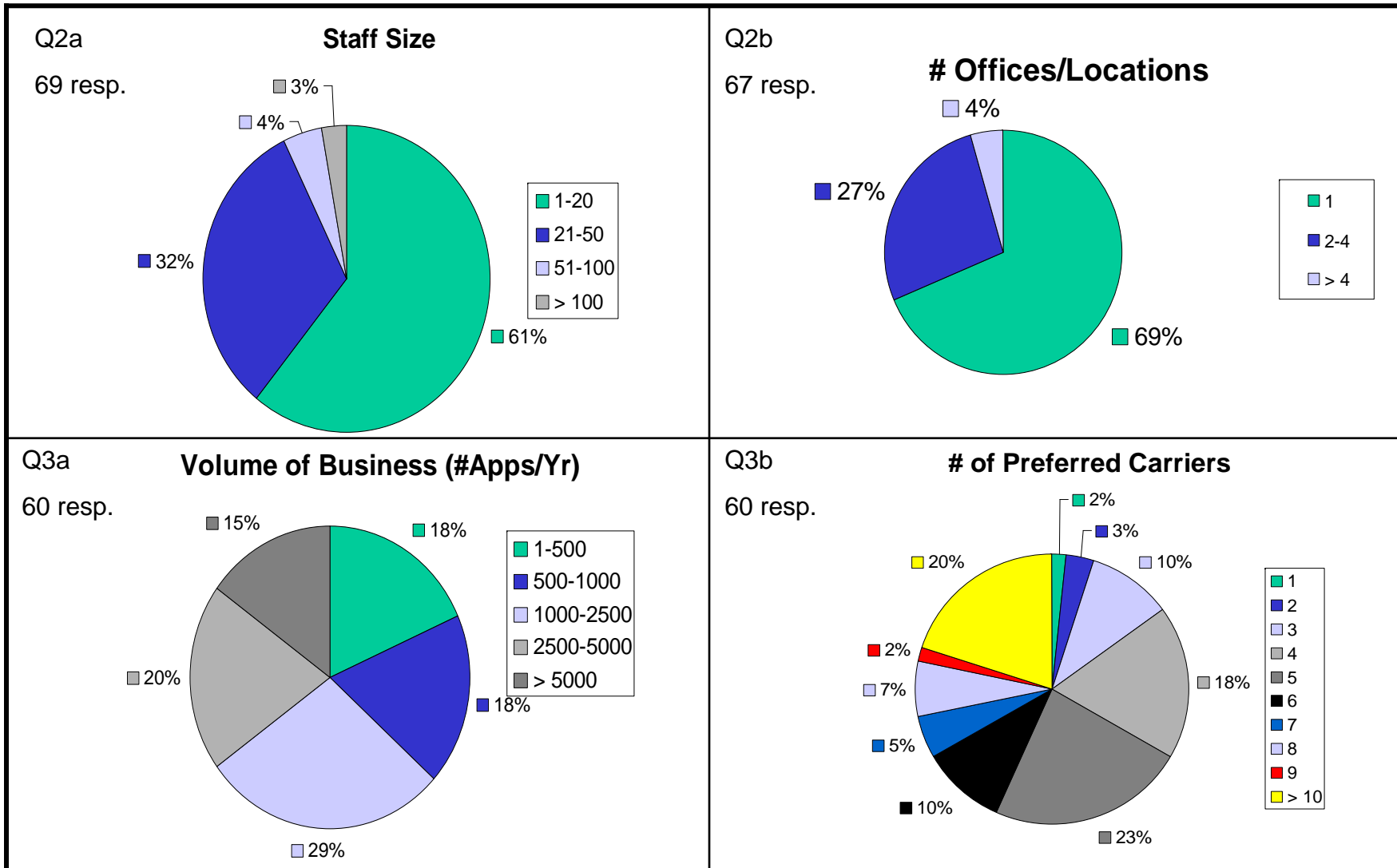
# Survey Objectives

- Compile survey results for the NAILBA Focus Meeting.
  - Begin work in January, distribute in April, compile in May and review in June.
- Develop survey questionnaire that is only 10-15 questions.
- Format to be closed multiple choice questions & answers.
- Required time to complete the survey should be less than 10 minutes.
- Limit the answers to correct, appropriate providers based on the service referenced in the question using our Best Practices list as a guide.
- Align questions with Tech Implementation Committee goals for 2007.

# Survey Process overview

- The team began drafting the survey questions in January 2007.
- A small sub-group was formed and held periodic meetings through March of 2007.
- Survey questions were reviewed with the Technology Committee during the March meeting.
- The survey was distributed to the NAILBA members in early April and remained open throughout the month.
- There were 36 total questions.
- There were 80 member responses to the survey with 1700 individual responses to questions (60% of total opportunities).
  - There was a fall off in responses after approximately the 10<sup>th</sup> question.
- There were 24 vendor names and 24 Carrier names mentioned.

# Survey Data

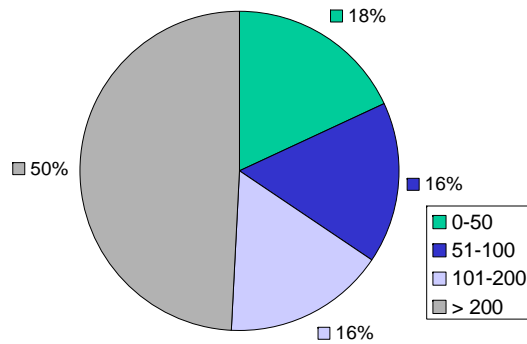


# Survey Data (Cont.)

Q3c

61 resp.

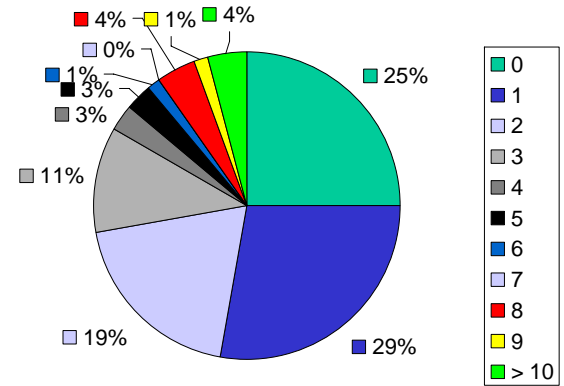
**# Agents w/ Atleast 2 Apps in past 12 Mos.**



Q4

72 resp.

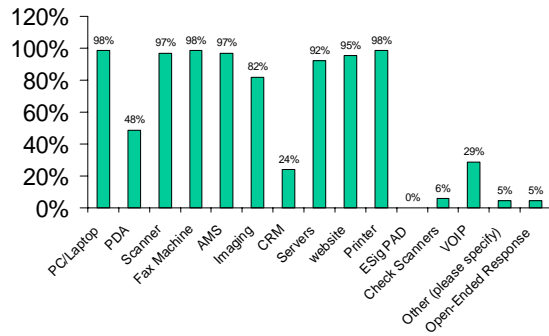
**# Internal Tech Staff**



Q5

66 resp.

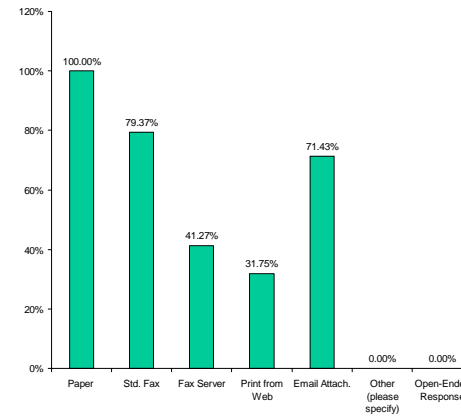
**Technology Used**



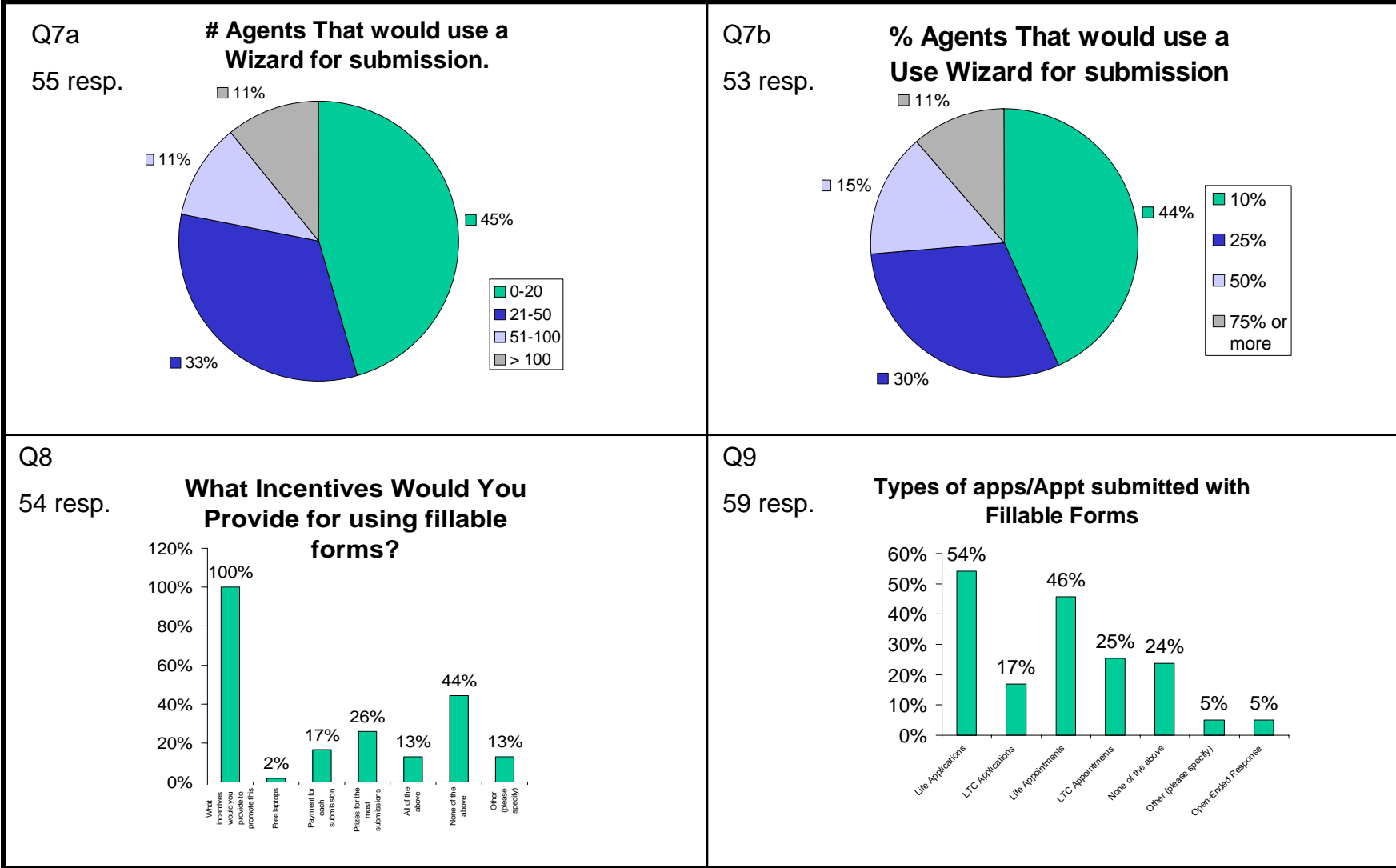
Q6

63 resp.

**Agent Application Submission**



# Survey Data (Cont.)

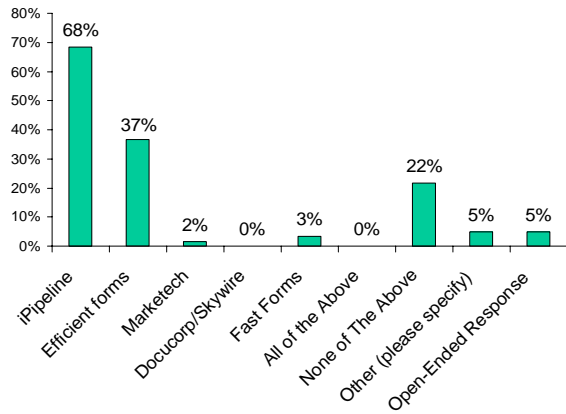


# Survey Data (Cont.)

Q10

## Fillable Forms Vendors

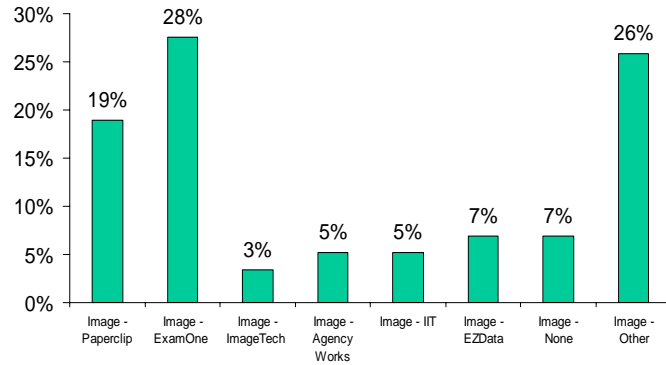
60 resp.



Q11a

## Vendor Storing Images

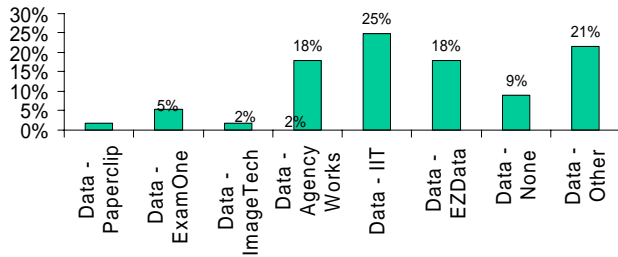
58 resp.



Q11b

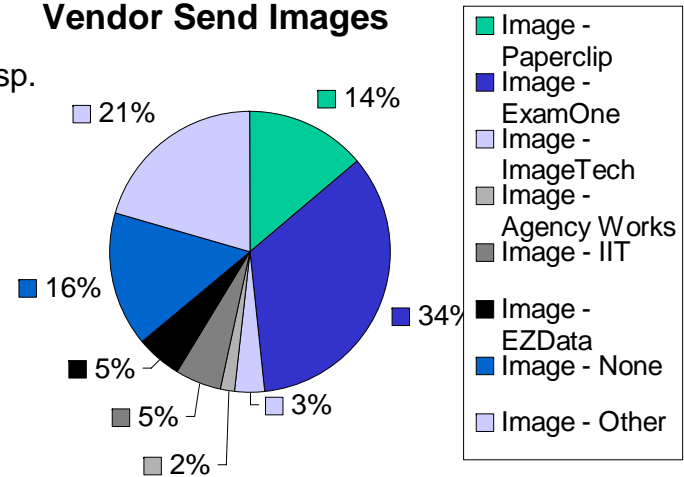
## Vendor Storing Data

56 resp.

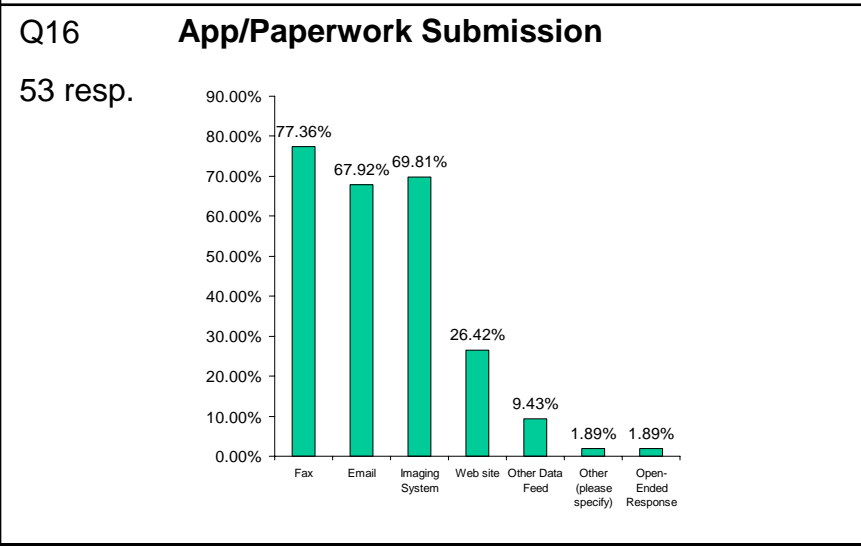
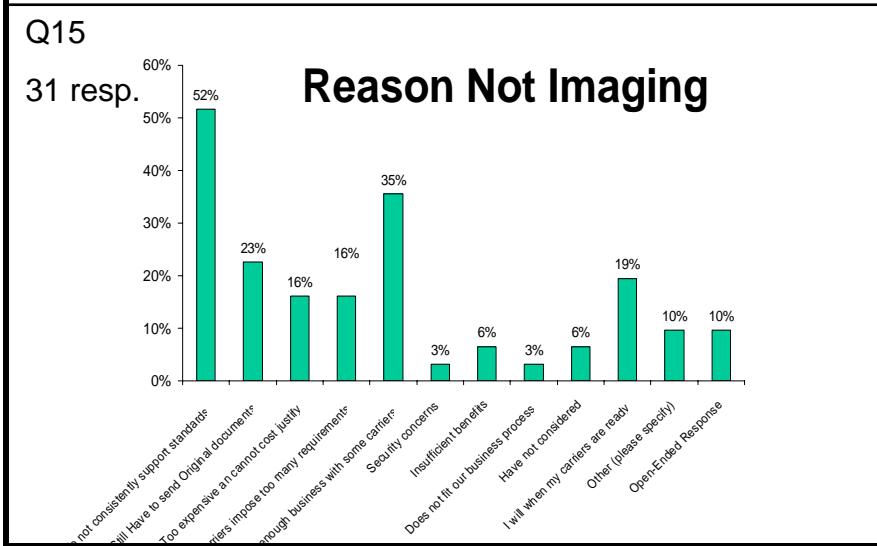
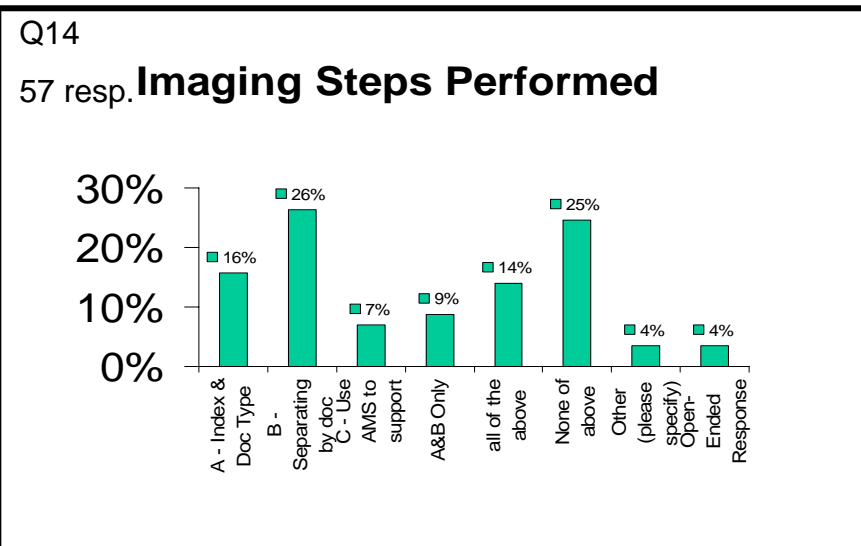
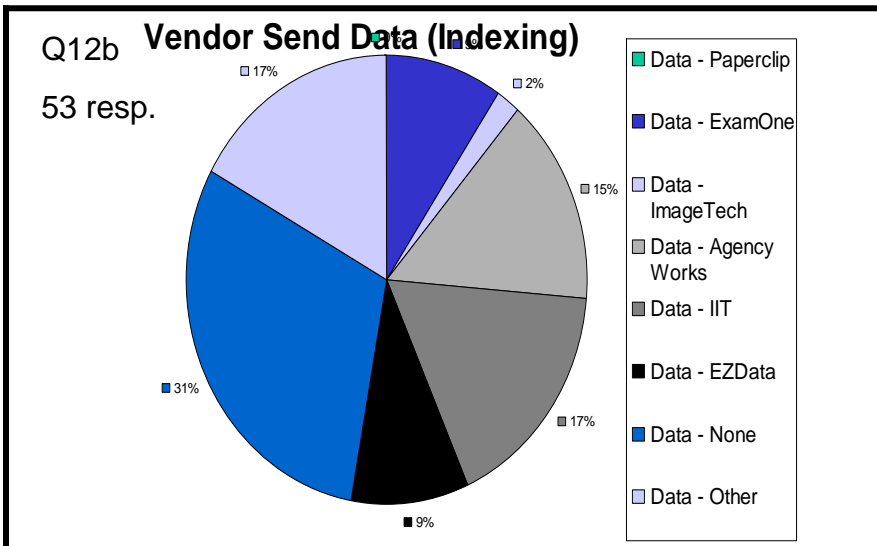


Q12a Vendor Send Images

58 resp.



# Survey Data (Cont.)

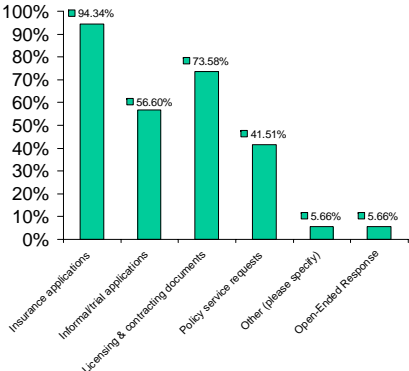


# Survey Data (Cont.)

Q17

53 resp.

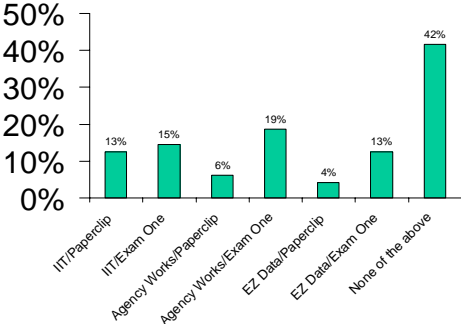
**Types of Paperwork Submitted**



Q18

48 resp.

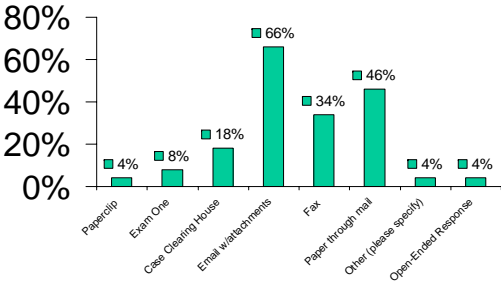
**Data/Image e-Submission (App Upload)**



Q19

50 resp.

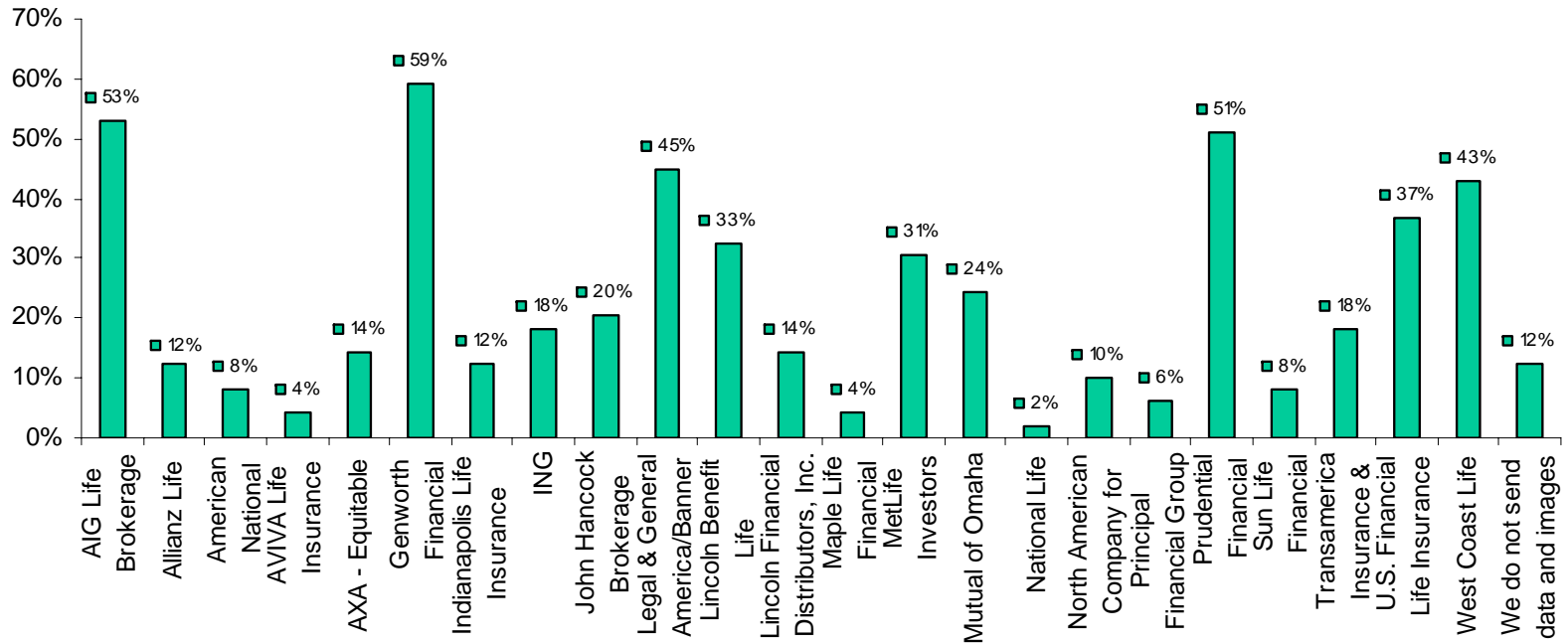
**Trial Information Submission**



Q20a  
49 resp.

# Survey Data (Cont.)

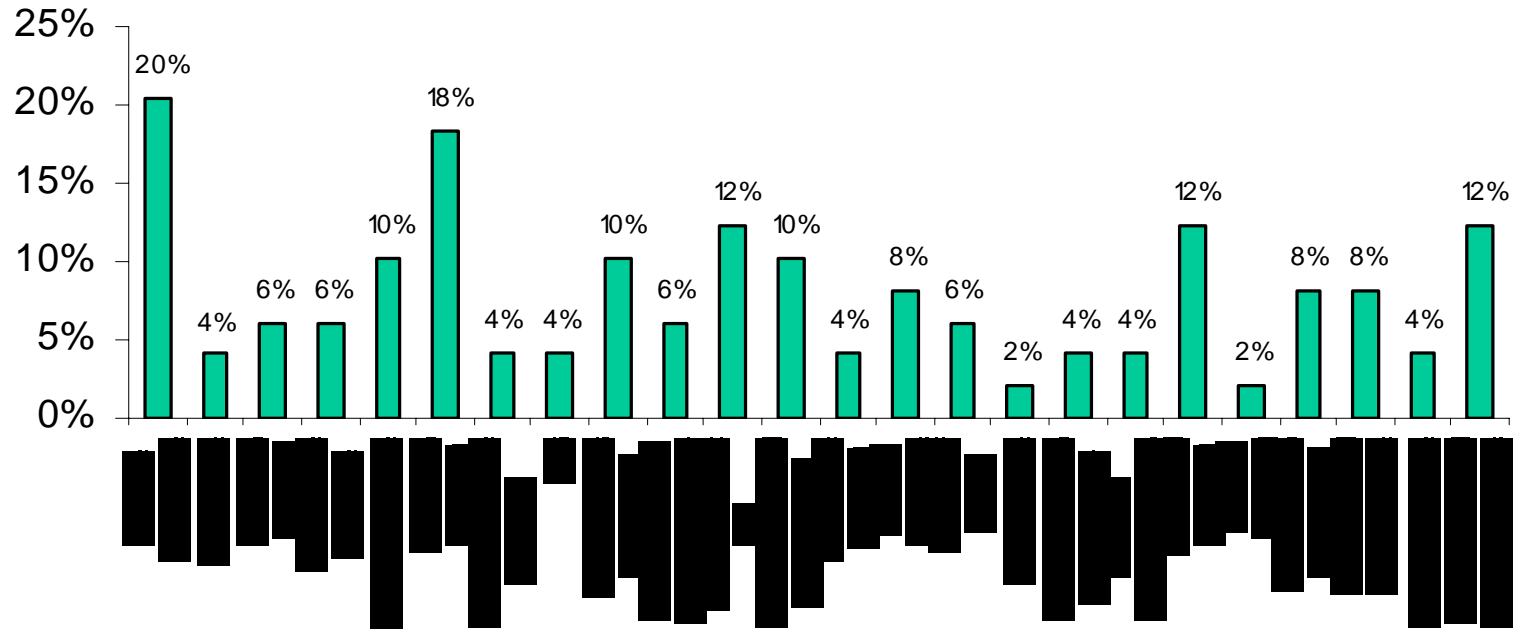
## Sending Images To Carrier



Q20b  
49 resp.

# Survey Data (Cont.)

## Sending Data To Carrier (Indexing)

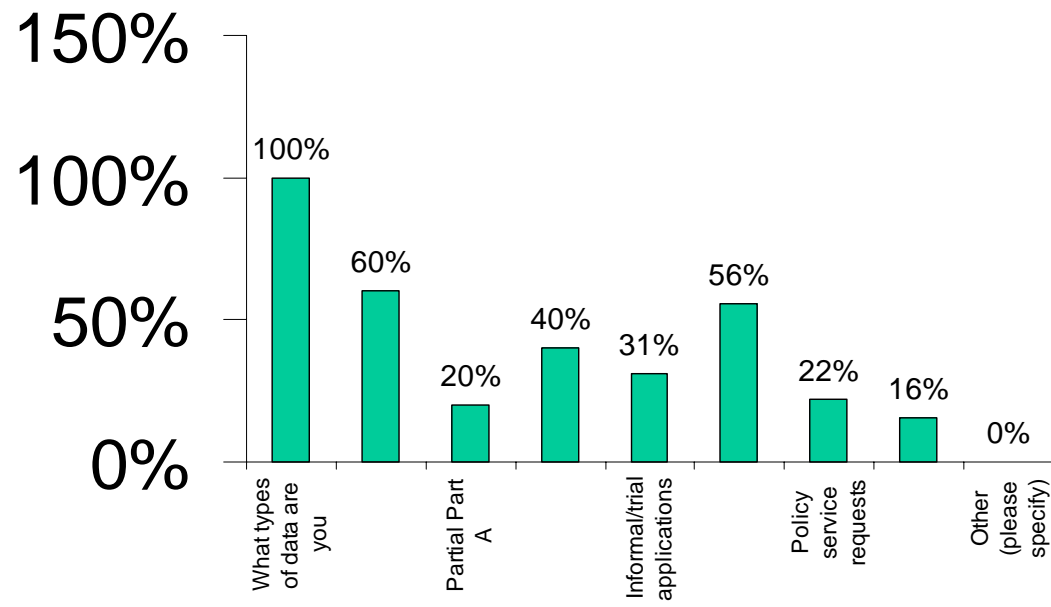


Q21

45 resp.

# Survey Data (Cont.)

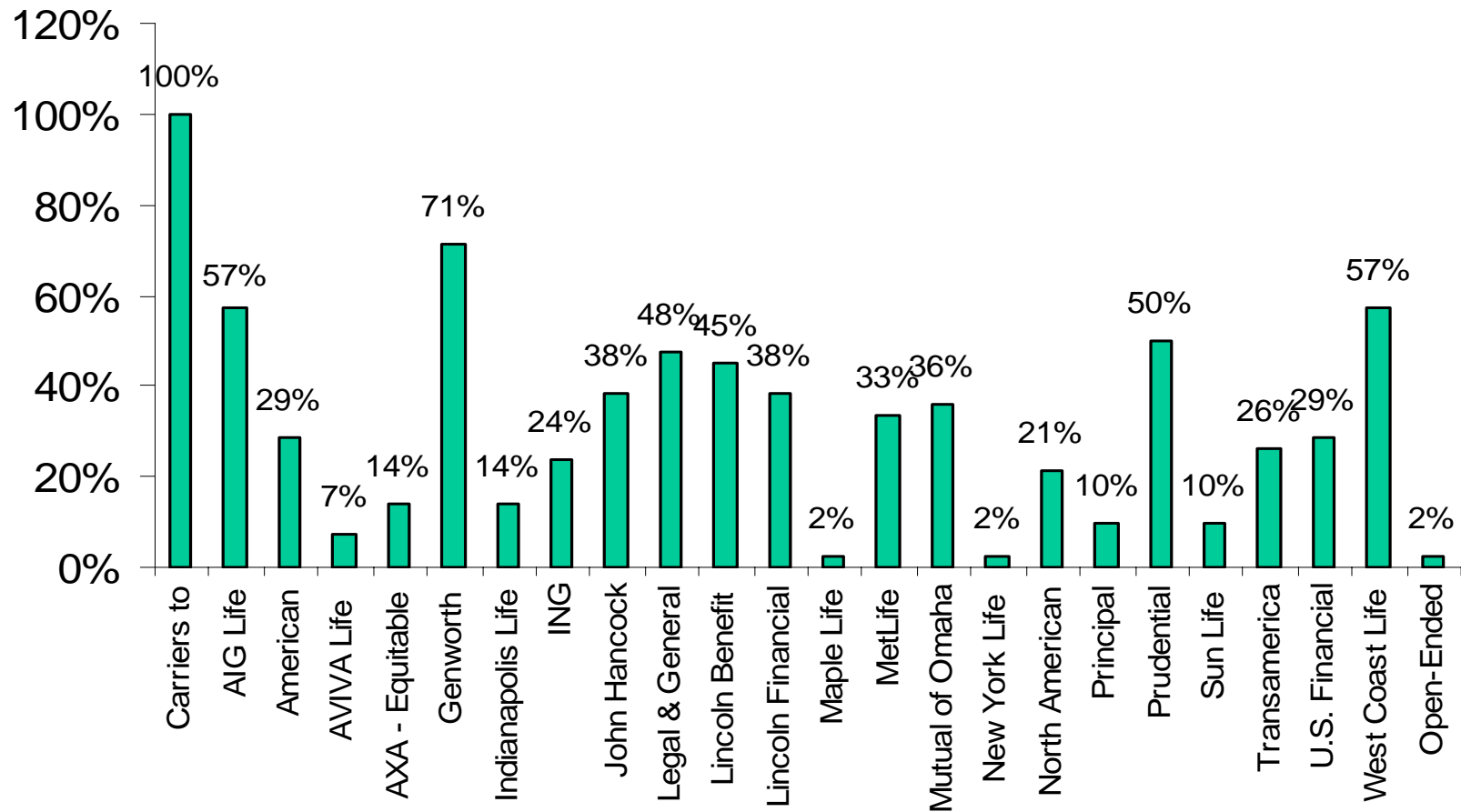
## Types of Data Transmitted to Carrier



Q22  
42 resp.

# Survey Data (Cont.)

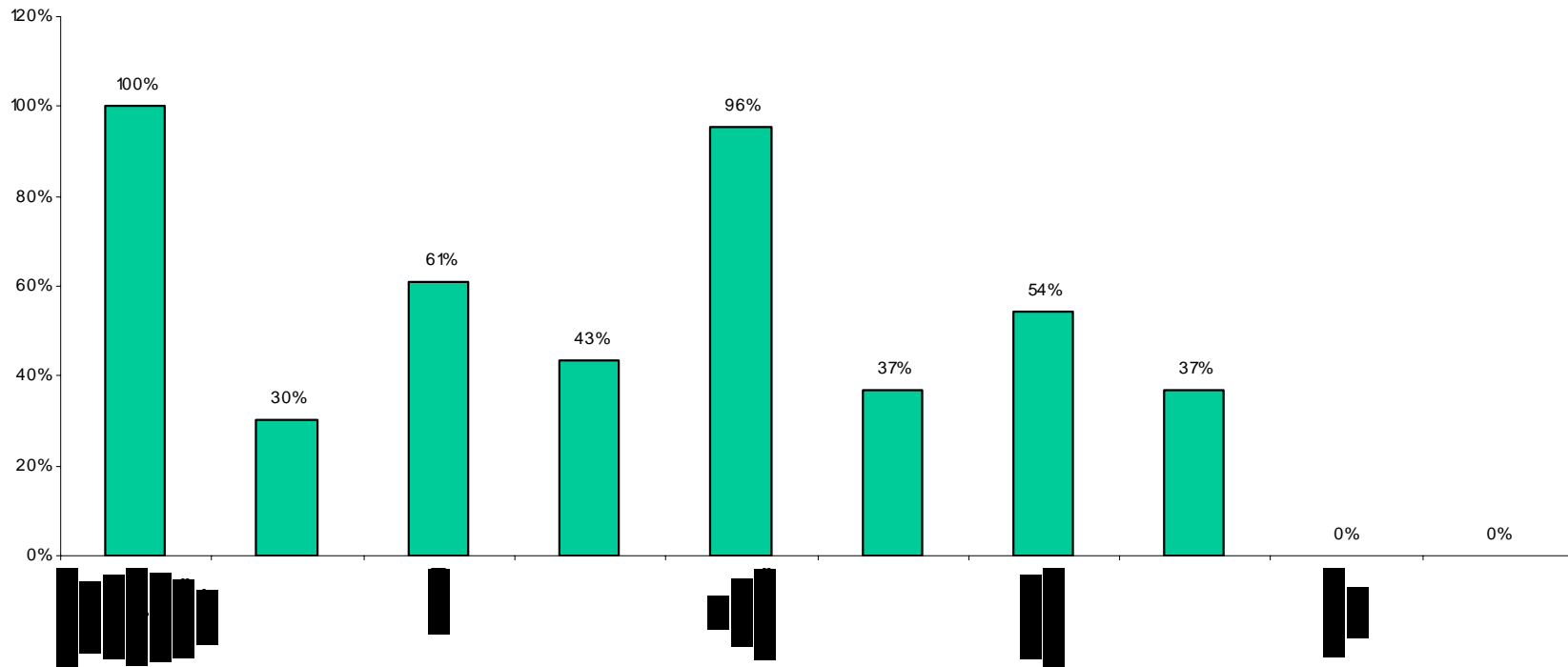
## Receiving Data From carriers



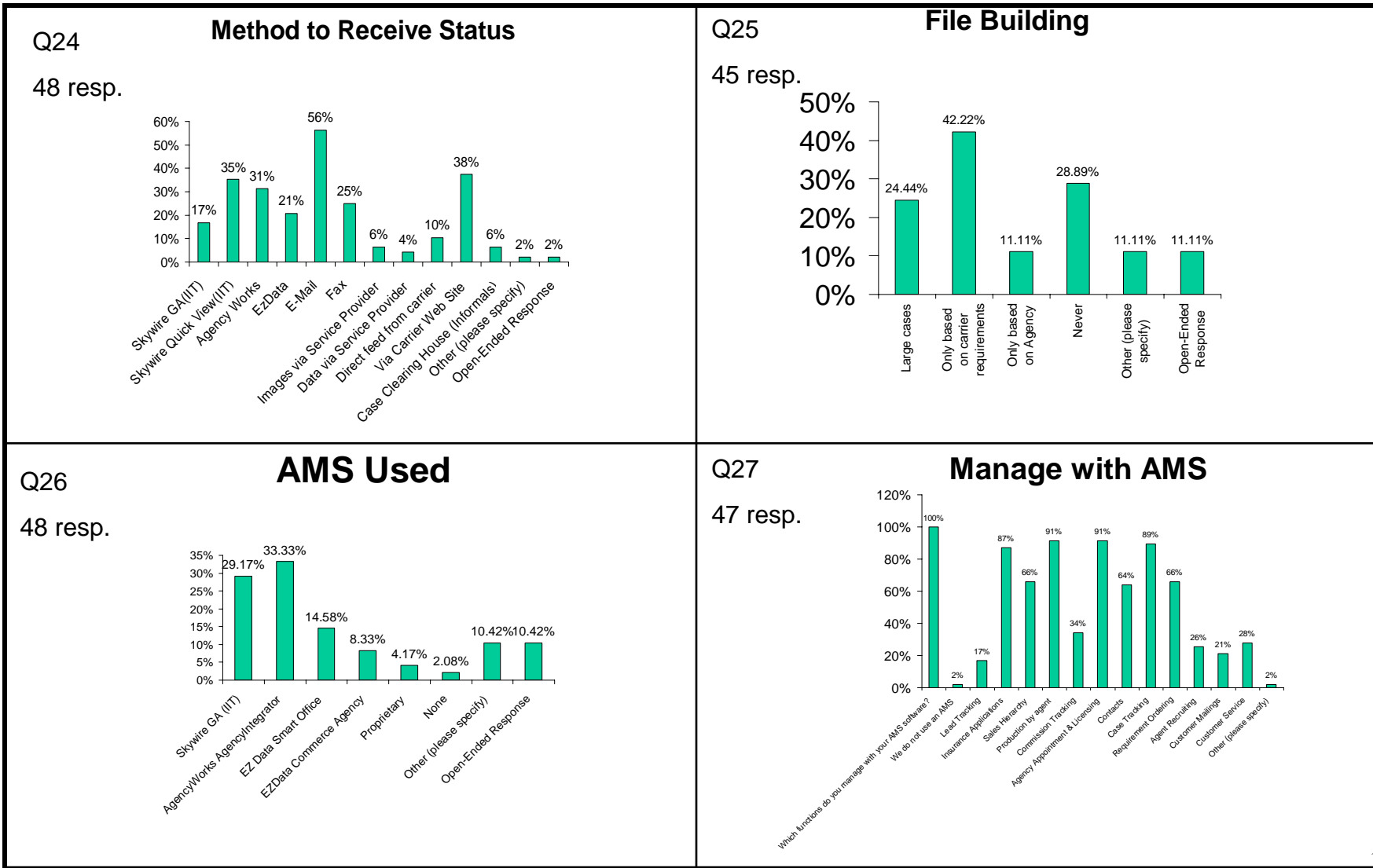
Q23  
46 resp.

# Survey Data (Cont.)

## Types of Status Received



# Survey Data (Cont.)

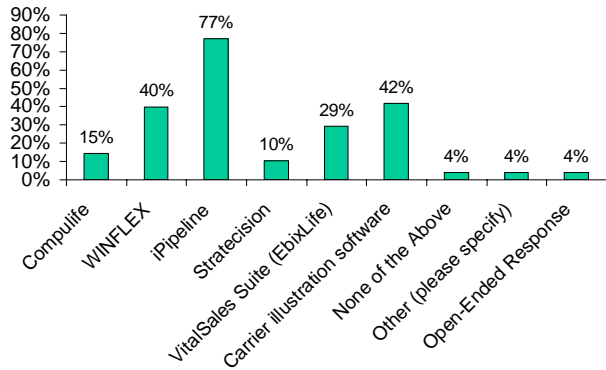


# Survey Data (Cont.)

Q28

48 resp.

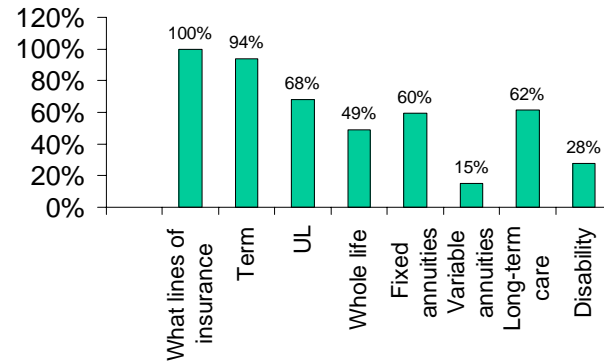
## Web Quoting/Illustration



Q29

47 resp.

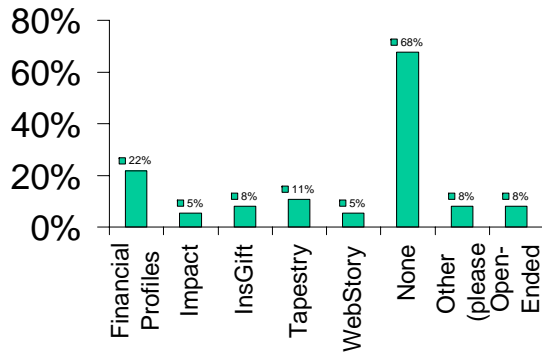
## LOB's Quote/Illustration



Q30

37 resp.

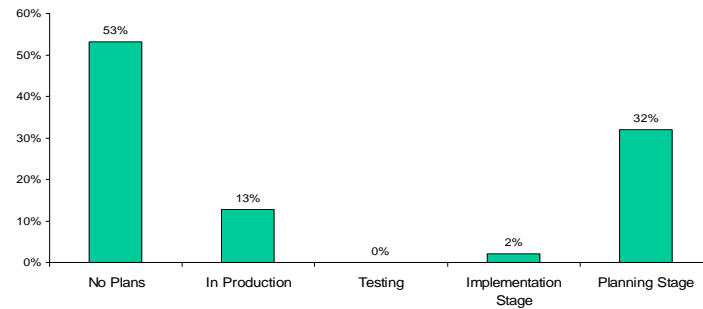
## Presentation Software



Q31

47 resp.

## Use or planning to use Secure eMail by Agency

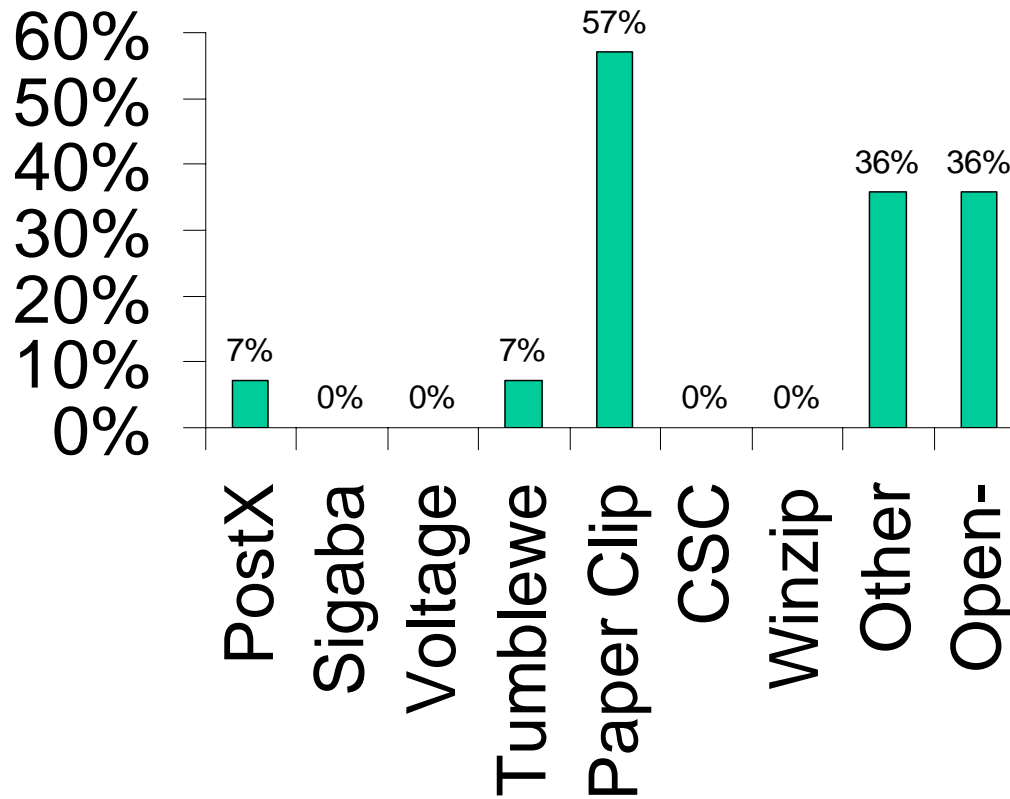


Q32  
14 resp.

# Survey Data (Cont.)

## Secure eMail Vendor Used

32



Q33

46 resp.

# Survey Data (Cont.)

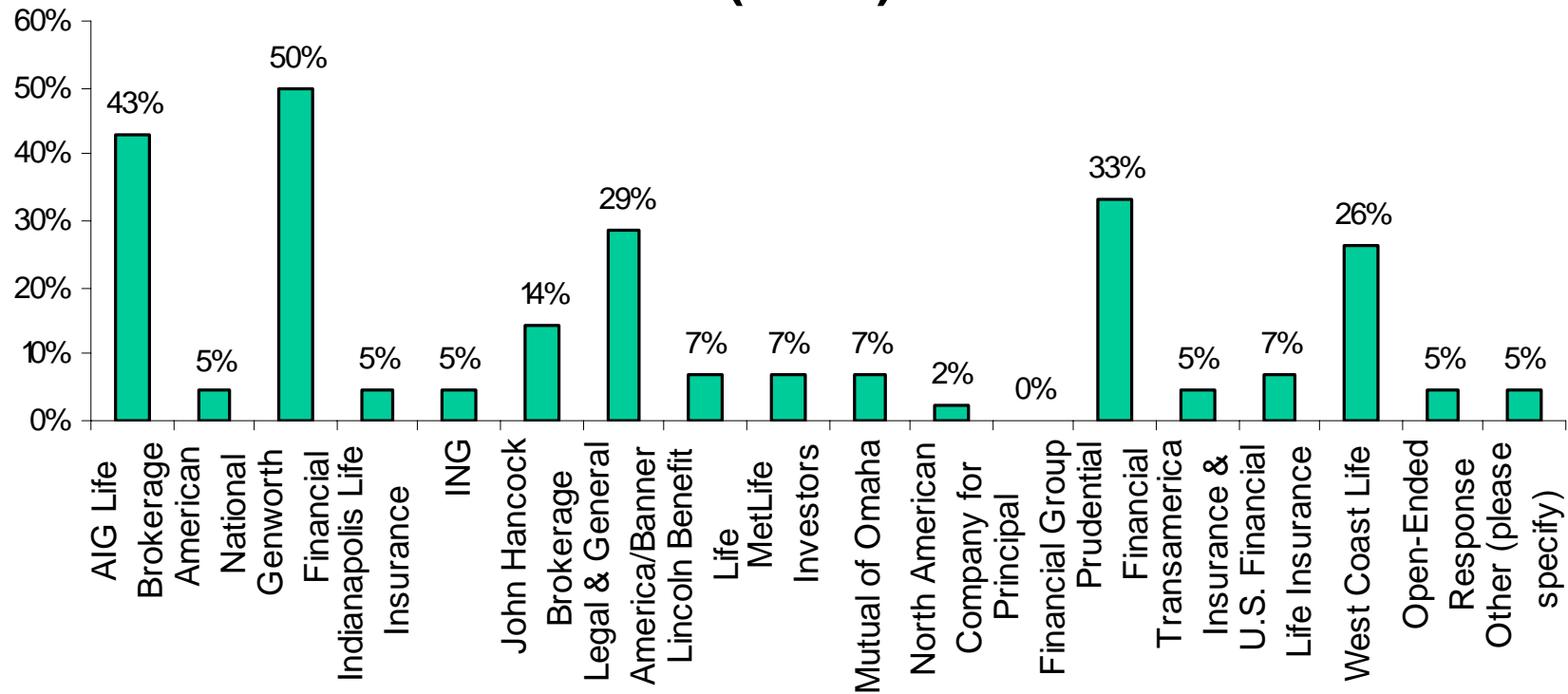
What are the top technology solutions that would add value if supported within the industry? (Please rank from 1-7 with 1 being the highest)									
	Highest	2	3	4	5	6	Lowest	Rating Average	Response Count
Fillable forms (Efficient Forms, I-Pipeline, Marketech, etc)	<b>35.1% (13)</b>	24.3% (9)	5.4% (2)	18.9% (7)	13.5% (5)	2.7% (1)	0.0% (0)	2.59	37
Real time Paramed exam scheduling	2.5% (1)	5.0% (2)	12.5% (5)	22.5% (9)	<b>27.5% (11)</b>	10.0% (4)	20.0% (8)	4.78	40
Agent & Applicant Electronic signature	12.2% (5)	14.6% (6)	<b>24.4% (10)</b>	14.6% (6)	9.8% (4)	22.0% (9)	2.4% (1)	3.71	41
Check 21 process for initial payment via check	4.9% (2)	7.3% (3)	14.6% (6)	7.3% (3)	19.5% (8)	17.1% (7)	<b>29.3% (12)</b>	4.98	41
Integrated status (all status for the fulfillment process available from a single source)	<b>35.7% (15)</b>	21.4% (9)	23.8% (10)	2.4% (1)	4.8% (2)	4.8% (2)	7.1% (3)	2.62	42
Electronic policy delivery	10.0% (4)	15.0% (6)	10.0% (4)	<b>20.0% (8)</b>	10.0% (4)	<b>20.0% (8)</b>	15.0% (6)	4.25	40
Secure e-Mail	7.0% (3)	18.6% (8)	14.0% (6)	11.6% (5)	14.0% (6)	14.0% (6)	<b>20.9% (9)</b>	4.33	43
	<i>answered question</i>								<b>46</b>
	<i>skipped question</i>								<b>34</b>

Q35

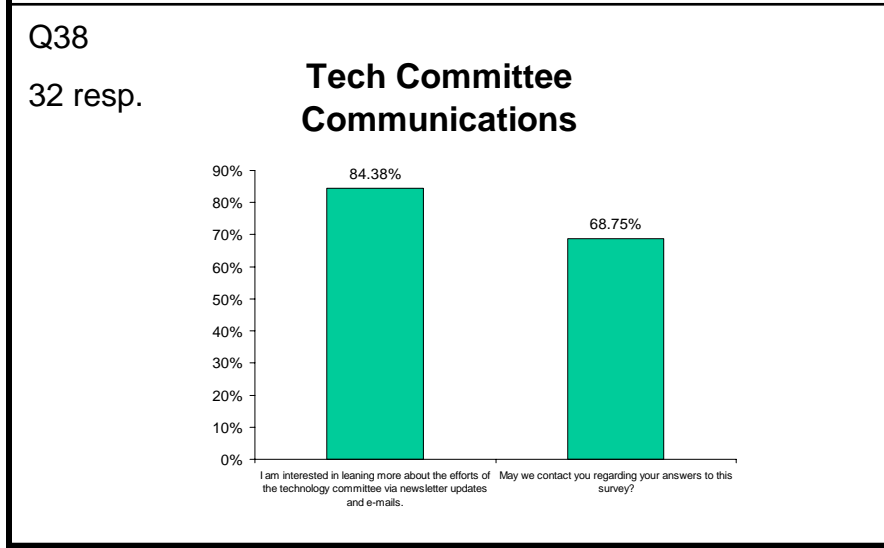
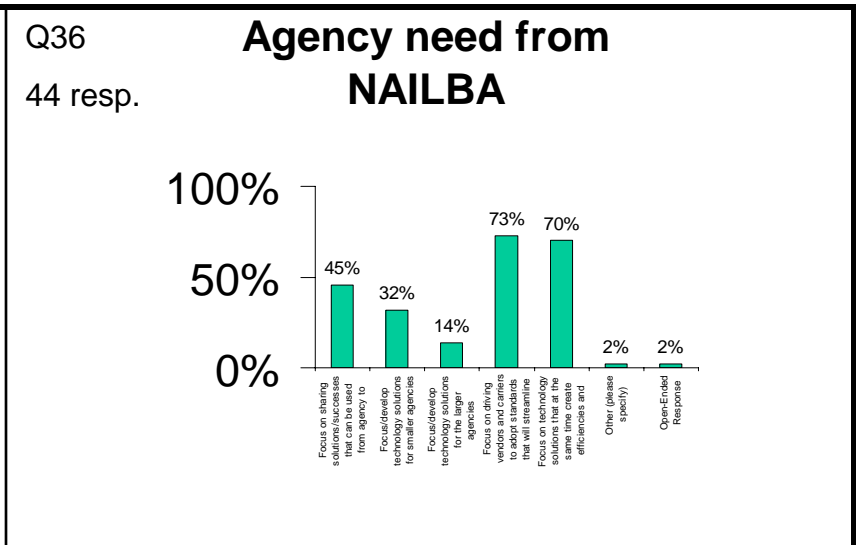
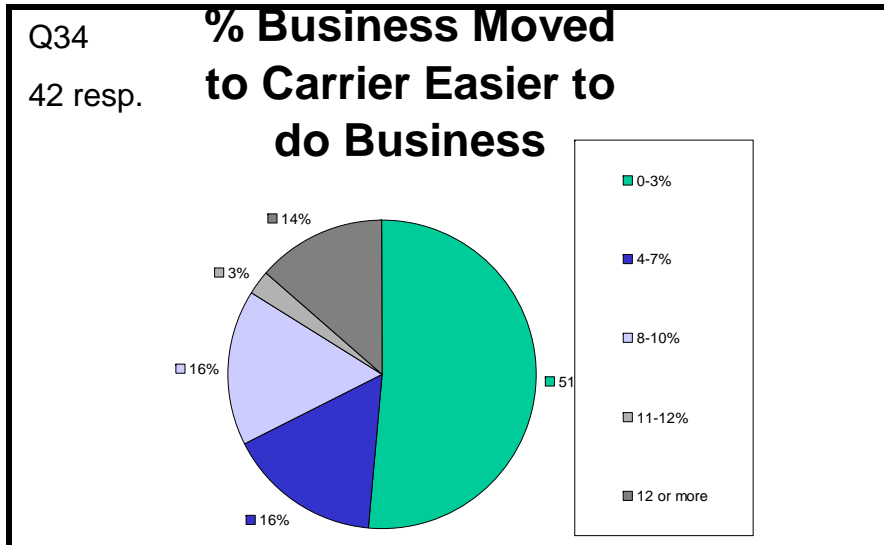
42 resp.

# Survey Data (Cont.)

## Easiest Carriers to do Business With (Tech)



# Survey Data (Cont.)



# Survey Improvements

- Insure that answers are appropriately aligned with the questions based on the best practices service list (ie. appropriate vendors, services, carriers, etc.).
- Significantly reduce the number of open ended questions to improve the quality of the answers.
- Broaden the scope of questions while narrowing the focus of the question.
- Limit the number of questions to 15 maximum.

# Lessons Learned

- There were a few late questions introduced. We need to incorporate feedback earlier in the process.
- We need to identify the optimal number of questions and responses to solicit the greatest response (15).
  - Align incentives with fully completed surveys.
- Use of follow-up e-mails helped.
- We need to consider giving small gifts to the first 10 respondents who fully complete the survey after the initial notification and each subsequent follow-up (30 winners).
- Personal follow-ups with NAILBA board members helped.

# Lessons Learned (Cont.)

- Adding the survey to the NAILBA periodicals and web site as well as including the date on the NAILBA calendar may enhance the response rate.
- An easier numbering scheme is needed for the survey questions.
- Limit the number of answers to a question to 7-8 maximum but optimally 4-5.
- Use survey Monkey charts for presentation.
- Wording associated with sending data must specify application data vs. index data for images.

# Next Steps

- Publish Results
- Share results with the NAILBA Community
- Gain buy-in from NAILBA leadership to sponsor motivational incentives for completion of the survey by Annual NAILBA meeting.
- Gain approval from NAILBA to support the 2008 survey at the Annual NAILBA meeting and solidify the survey schedule by December.
- Establish survey scope by Annual NAILBA meeting (number of questions, timeline, etc.).

# Questions?

If you have any questions about this survey please contact one of the following members of the Technology Implementation Sub Committee.

- Mark Hendry ([mark.hendry@prudential.com](mailto:mark.hendry@prudential.com))
- Jeff Kraber ([jkraber@nailba.org](mailto:jkraber@nailba.org))
- Grant Andrew ([grant.andrew@prudential.com](mailto:grant.andrew@prudential.com))
- Robb Daugherty ([Robb@oxbowmkt.com](mailto:Robb@oxbowmkt.com))