

Co-operators Life

Partnering for Success



Case Study

Are well-intended engagement strategies putting your best employees at risk? Your most engaged employees may be loyal...but are they energized?

The Opportunity

The Co-operators Group Limited is a Canadian-owned co-operative well known for its community involvement and commitment to sustainability. With more than \$33 billion in assets under administration, the organization offers home, auto, life, group, travel, commercial and farm insurance as well as investment products to more than two million Canadians.

Spanning the Co-operators group of companies is a common goal: to be where Canadians are, with the products Canadians need, when they need them, and however they wish to buy them. To attain that goal on an ongoing basis, the organization has long held up the importance of having a highly engaged workforce where employees take pride in being part of the organization, share its values, and work hard to support its mission.

In fact, international human resources firm Aon Hewitt has honoured The Co-operators on more than one occasion as among the 50 Best Employers in Canada—most recently in 2013.

Customer
The Co-operators

Industry
Insurance

Business Challenge

- Employees were engaged, but they were exhausted in their roles

Business Solution

- Kick-off Leadership Forum
- The Beyond Engagement Process
- The Beyond Engagement Manager's Toolkit
- One-on-one Coaching

Business Outcomes

- Employees are holding each other accountable
- Gained alignment on a project that was going off the rails
- People taking ownership of their needs/engagement
- Employees are beginning to resolve issues and problem solve on their own
- Conversations are saving managers time
- Sick time is dropping
- Overtime is dropping
- 9 of the 12 participants had increased Hewitt Engagement scores, some with statistically significant jumps



Despite this, in late 2012, Co-operators Life began to see its employee engagement scores faltering. Leaders sought answers to understand why. What emerged was that leaders and employees were still engaged to a certain degree, but they were exhausted in their roles. At the end of the day, *“...our staff and leaders didn’t feel they had the necessary time or energy to take outside the office—that is, to their families, activities and community at the end of the day,”* says Sandy Ram, [Organizational Development, Human Resources] of The Co-operators Life.

The co-operative identified energy—not engagement—as critical to its ability to remain successful, profitable and to meet client needs in the ever-changing insurance industry. Traditional business and human resources efforts were realizing minimal to modest success but were not bringing back the zest and passion of employees and leaders. Moreover, recent layoffs had only added to their energy depletion.

“Trying to stay competitive in this industry requires a fair amount of resilience of our employees—and as a result, our people began to lose a level of engagement and energy,” explains Ram. “What we needed was to find a way to restore things; and remove any individual, team and corporate interferences getting in the way of our ability to remain competitive.”

Consequently, the co-operative embarked on a journey to find a new way of approaching engagement: one that focused not on scores or numbers, but on building the conditions to energize its employees.

The Solution

As the organization looked for solutions, it realized it needed a simple program or philosophy that would be easy to implement, and that would not deplete employees’ or leaders’ energy levels any further.

“We didn’t want our leaders to look at this initiative as additional work, or that we were adding another layer to our leaders’ current demands,” says Ram. “We wanted to bring ease to what they were doing.”

The co-operative consulted Guelph-based Juice Inc.—a self-proclaimed “energy company”—for assistance. What emerged was





“a really refreshing and insightful model of how we could move past engagement to energizing leaders and employees, figuring out the skills required to release that energy, and minimizing some of the burden our leaders often felt they carried when it came to fixing engagement issues,” recalls Ram.

That model was called Beyond Engagement: a program that teaches leaders how to use simple energy conversations to successfully make the shift from managing engagement to managing energy, to tap into the “fuel” that drives sustainable business results.

To test the waters, The Co-operators and Juice jointly partnered in a three month pilot of the Beyond Engagement program across three of its divisions: Co-operators Life Insurance Company, Travel Insurance Coordinators, and CUMIS. A dozen employees were selected as part of the pilot group—each one representing different functions across the organization.

The pilot involved many steps, including:

- Pre-assessment: Pilot participants already had metrics from their corporate-wide engagement survey to act as a baseline, and they (along with their leader) completed a simple assessment of how energized their team was at the present time.
- Preliminary training: Pilot participant leaders attended three days of training during which they learned the Beyond Engagement approach, as well as the skills required to restore employee energy.
- Preparing staff: Participants were provided a presentation and team experience to communicate the value of the Beyond Engagement approach to employees and invite them into the process rather than “doing something to them.”
- Energy conversations: For three months, pilot participant leaders engaged in multiple one-on-one “energy checks” with individuals on their team. These simple and quick check-ins helped to pinpoint what was affecting employees’ day-to-day energy levels, and allowed managers and employees to co-create the conditions in which they and their teams could naturally go the extra mile in their jobs. On occasion, leaders also conducted team energy checks in group settings with their own teams. Managers were already having





conversations and meetings; Juice simply asked them to do those a bit differently using a simple tool.

- Ongoing practice: Throughout the pilot, each individual received three coaching calls from Juice, to assist them in improving their energy conversational skills.

Throughout the process, corporate “sponsors” (pilot participants’ managers) and human resources consultants were also encouraged to support participants’ success, read through communications, and receive virtual training pertaining to Beyond Engagement.

The Results: Unlocking What Matters Most

The sales staff team was able to put what they learned to use right away. At the end of three months, the organization compared participants’ pre-pilot and post-pilot engagement levels as reported in the corporate engagement-wide survey. The majority reported an increase in engagement, some with statistically significant jumps of as high as 40 per cent.

However, says Ram, *“We really do want to de-emphasize scores. It’s not our focal point: our objective is how to release energy and remove any interference getting in the way of that energy, on a day-to-day basis.”*

Anecdotally, pilot participants reported seeing employees beginning to take more ownership of and accountability for their own engagement.

“Traditionally, engagement has been seen as something that leaders need to own. But we saw employees beginning to resolve their own issues and do their own problem-solving,” says Ram. “This saved managers’ time because they didn’t have to be so involved in dealing with the day-to-day issues that employees could take on themselves.”

The communication skills learned during the pilot were also put to use by one pilot participant, who needed to move a project forward despite team resistance.

“As a manager I began to identify what things were really important—not to the team, but to each individual,” said one of our Pilot Participant Leader’s. “In doing so, I was able to create a safe, higher





trust environment where people felt more comfortable sharing what they felt was getting in the way of the project's success. As a result, I was able to save this particular project from going off the rails by gaining alignment across the team."

But perhaps no anecdote is more emblematic of the pilot's success than what happened between Tina, a business analyst, and her manager Alan.

Tina had spent the previous two years experiencing several life setbacks. As a result, she struggled with absenteeism, stress-induced illness, and a general sense of dissatisfaction in her work situation.

When Alan inherited Tina as part of his team, upper management gave him carte blanche to deal with her issues. Alan looked at Tina as someone who still had a lot to contribute—if only he could figure out and remove whatever was standing in the way of her success.

Alan's assumption: Tina needed less work. Consequently, he took several tasks off Tina's plate—yet Tina's work performance failed to improve.

Alan was baffled. If it wasn't a workload issue, how could he get Tina back to being a productive employee?

"Sometimes, a manager thinks they know what their employees need," says Ram. "But during the Beyond Engagement pilot, some of our participant leaders began to see things differently."

Alan began meeting with Tina for energy check conversations—and it was only when he directly asked her *"What matters most to you? How can we work together so you can do your best work here?"* that he discovered what drove her to be a superstar employee. To his surprise, Tina wanted more challenges, not less!

"With so much turmoil in her personal life, Tina felt the one place where she could build and demonstrate her value and significance was at work," explains Alan. "This was a profound awakening to me—and it told us that leaders need to consider the distinction between declaring their support, and actually ensuring that support is felt."

As a result, Tina began to feel completely supported by her new manager—and consequently began to hit balls out of the park





with every new assignment and responsibility. Her absentee rate decreased significantly, and she began coming in early and staying late: even losing track of time because she was so engaged in what she was doing.

Today, Alan refers to Tina as “1.5 employees wrapped up in one body.”

“Beyond Engagement gave us the tools and skills to help us describe how we feel about things—particularly things getting in the way of our energy levels and engagement,” says Alan. “Before, we didn’t know how to put this stuff into words. Beyond Engagement has given us that language.”

The Beyond Engagement program is currently being rolled out across the entire organization—and based on pilot results, Sandy Ram has high hopes for its success.

“My vision is that, in the future, we’re no longer holding a script in our hands to guide the conversation—that this new way of communicating with and understanding each other just becomes a natural part of our being and business operations. Beyond Engagement will hopefully become a mainstay program, and part of our company’s common language and common fabric. Given the fantastic results of the pilot, I have faith we will see many more success stories in the future across The Co-operators.”

About Beyond Engagement

Are your well-intended engagement strategies putting your best employees at risk? Your most engaged employees may be loyal... but are they energized?

Today’s organizational leaders face a new challenge: how to move employees beyond engagement to a culture where their workforce can manage the needs of employees and the needs of the organization, release bottled-up innovative thinking and consistently create breakthrough business results. The key lies in energy. Leaders who can successfully shift from managing engagement to managing energy will make a monumental difference to their people and consequently, business results.





Creating a culture that harnesses and fosters sustainable organizational energy is not easy—but it is possible. Beyond Engagement will transform the way you look at engagement.

About Juice

Juice Inc. clients think of Juice as their performance partner. Juice believes energized and engaged employees fuel great customer experiences and better business results. That's why Juice focuses on ideas, skills and tools that people can put to use immediately. The organizations Juice partners with get committed people who own the results!

Juice also builds upon and leverages the work that organizations have already done so they get more from their investment, creating energized teams, better performance and results that matter.

For more information about how Juice can help your organization, email info@juiceinc.com.

JUICE INC.

Orchard Park
5420 Hwy 6 N., Suite 390
Guelph, ON Canada N1H 6J2

Office Phone: 519-822-5479

Toll Free Phone: 1-888-822-5479

Email: info@juiceinc.com

Web Site: <http://www.juiceinc.com>

