



## MetLife, PILOT Team Up to Increase Female Promotions in Sales

MetLife

Best Advance in Women's Leadership

October 2018

### Company Background



<b>Company-at-a-Glance</b>	MetLife is a leading global provider of insurance, annuities and employee benefits programs, serving 90 million customers.
<b>Headquarters</b>	New York, New York
<b>Year Founded</b>	1868
<b>Revenue</b>	\$62 billion
<b>Employees</b>	49,000
<b>Global Scale (Regions that you operate in or provide services to)</b>	MetLife has operations in more than 40 countries and holds leading market positions in the United States, Japan, Latin America, Asia, Europe and the Middle East.
<b>Customers/Output, etc. (Key customers and services offered)</b>	MetLife is a leading financial services company, providing insurance, annuities, employee benefits and asset management to help its individual and institutional customers navigate their changing world.
<b>Industry</b>	Financial Services
<b>Stock Symbol</b>	MET
<b>Website</b>	<a href="http://www.metlife.com">www.metlife.com</a>

## Budget and Timeframe

<b>Budget and Timeframe</b>	\$40,000 over 12 months (including \$10,000 for workshop/keynote and \$30,000 for 12-month coaching program).
<b>Overall budget</b>	Confidential (includes other internal meetings, travel, etc.).
<b>Number of (HR, Learning, Talent) employees involved with the implementation?</b>	4 management sponsors (VP/AVP/director level staff responsible for Women in Sales program design and execution).
<b>Number of Operations or Subject Matter Expert employees involved with the implementation?</b>	2 executive champions (SVP-level, direct reports to group president).
<b>Number of contractors involved with implementation</b>	Majority of PILOT team involved in coaching program design, delivery and feedback/improvement.
<b>Timeframe to implement</b>	23 days (from date of signed PILOT contract to program kickoff).
<b>Start date of the program</b>	September 2017

## Business Conditions and Business Needs

Comprehensive career development can be difficult to provide within busy, complex organizations but is critical for continuously developing high-potential leaders. The MetLife Women in Sales program partnered with career improvement startup PILOT to provide thoughtful individual executive coaching to meet this need.

MetLife for years has been focused in, investing in and experimenting with diversity and inclusion efforts to ensure its workforce represents its increasingly diverse customer base and to remain competitive in a changing marketplace. A vast majority of benefits managers (MetLife’s typical customer) are female. However, MetLife Group Benefits in the United States has struggled to promote women into senior leadership roles within sales despite consistent and visible leadership commitment to do so. While MetLife does a stellar job of attracting and retaining women in its organization, in particular in client service, it continued to struggle to promote women from account executive (individual contributor) roles into regional directors (managers) or from regional directors to regional vice presidents. MetLife has invested millions into consulting, studies, training, conferences, sponsorships and more to address this challenge.



MetLife has hosted an annual Woman in Sales summit, a qualifying sales event for its most-promising female sales talent, for nearly a decade. The multi-year program receives rave remarks from the nationwide attendees. However, participants have long requested more continuous and sustained support and enablement for their career development. Participants often return from the summit energized, but putting into action what they learned and keeping their growth and development a priority is typically very challenging.

Frustrated with only incremental progress in female promotion rates within its sales organization, MetLife executive management was open to entirely new approaches to tackle this business imperative. MetLife sees having both a current management team and future talent pipeline that is gender balanced and inclusive as a mission-critical priority to effectively grow its business and retain its existing customers.

## Overview

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MetLife partnered with an innovative HR technology startup, PILOT Inc., to augment and fortify its Women in Sales program. Specifically, PILOT was retained to both lead a keynote and workshop at the 2017 summit hosted in Denver, Colorado, followed by a year-long PILOT coaching program for the leadership track of associates from the summit.

MetLife executives were attracted to PILOT's coaching approach for a variety of reasons, including:

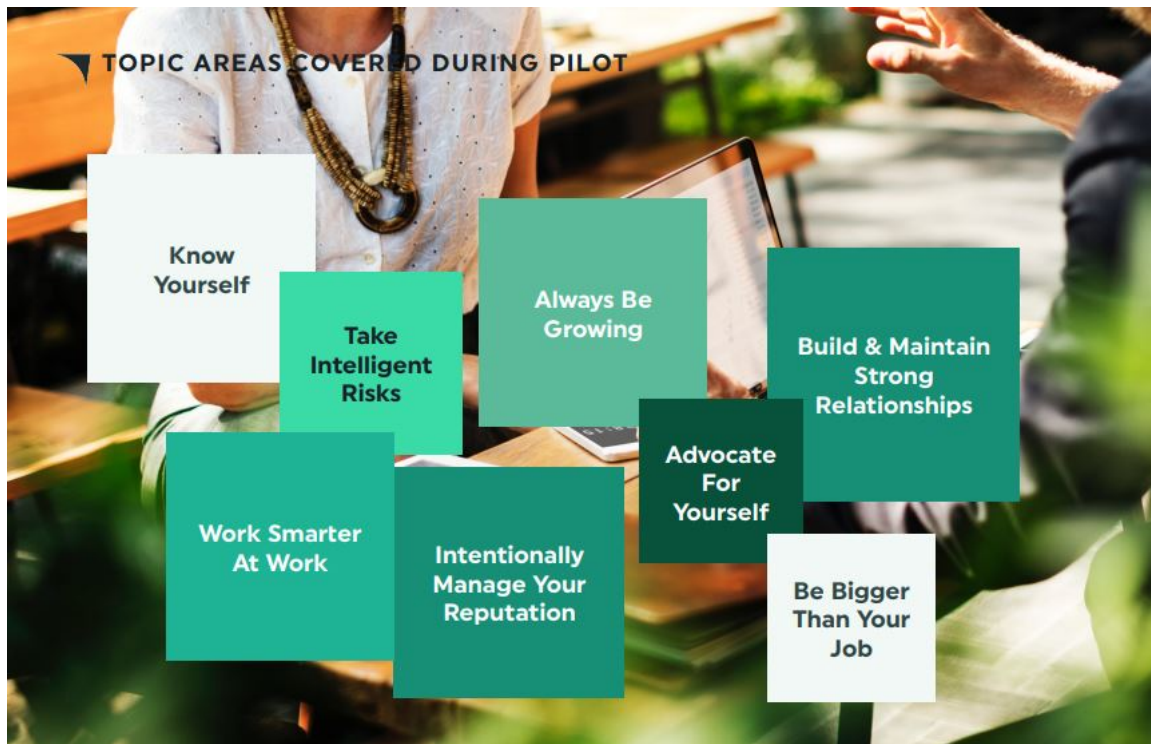
- **Continuous** — PILOT enabled MetLife to expand Women in Sales into a truly year-long program, rather than just a compelling annual event.
- **Employee-Owned** — PILOT focused on employee ownership and responsibility in its own growth and development (relative to its aspirations, interests, and values) — a radical departure from employees waiting to be “tapped on the shoulder” or for their manager to drive their development.
- **Empowering** — PILOT provided encouragement, inspiration and even permission for its female sales employees to advocate for themselves and more candidly share their aspirations and needs.
- **Snackable** — PILOT delivered career development in a remarkably digestible manner by engaging its employees in 10 to 15 minute increments weekly, breaking down the overwhelming idea of career management into manageable moments.



- **On-Demand** — PILOT accommodated the customer-focused schedules of its sales employees by allowing them to engage in professional development outside of core sales hours, including during their commute or while at home.
- **Mobile** — PILOT provided a platform that can be accessed via smartphone, tablet and PC, which enabled an on-the-go sales force an opportunity to focus on personal development in a way that works with their day today.
- **Inclusive** — PILOT brought together employees from offices across the US, including employees who worked remotely and seldom visited a MetLife office.
- **Action-Oriented** — PILOT was designed with a bias toward employees taking tangible action in the real world with an aim to change behavior, shift perspective and produce real results.
- **Comprehensive** — PILOT offered a coaching program that covered a wide array of topics that were relevant to modern professionals, with a commitment to help employees find both success and satisfaction in their careers.
- **Data-Driven** — PILOT equipped executive management with aggregated analytics that effortlessly provided compelling systemic insights, as well as evidence of impact from the coaching.
- **Affordable** — PILOT coaching was extremely cost-effective, which enabled MetLife to provide executive coaching to far more employees than usual.
- **Innovative** — PILOT leveraged innovative technology, had an inspiring brand and delivered highly relevant and unique coaching topics that were largely not covered by existing learning and development initiatives.



Figure 1: A List of Topics Covered During PILOT



Source: MetLife

## Design and Delivery of the Program

PILOT coaching is anchored upon the premise that: 1) meaningful, effective professional coaching can be done in short, “snackable” sessions that easily fit into even the busiest schedules; and 2) individuals can (and should) own their own career advancement and skill-building.

Through weekly 10- to 15-minute software-based coaching sessions — each done online and accessible either on a computer or mobile device — members of the MetLife Women in Sales PILOT team have learned skills to assist them in advocating for themselves, building their personal brands, solving problems creatively, managing their reputation and developing an inventory of their career aspirations. They have been asked to seek feedback from colleagues and have been given the tools and skills necessary to reduce discomfort. Weekly coaching activities include short personable coaching videos (all of which are closed captioned with auto-play for easy consumption in open-plan offices or on the go) and are accompanied by attractively designed coaching output reports which include additional advice and coaching delivered by email.



In addition to the short-but-powerful coaching sessions, members receive an hour-long interactive live coaching session roughly every six weeks with PILOT founder and CEO Ben Brooks. During these sessions, links are drawn between the varying weeks of PILOT work and a dialogue is struck between PILOT coaches and PILOT members, which encourages them to continually take action in their careers. These sessions are a sharp contrast from typical eLearning, webinars or internal meetings, as they are designed to be highly participatory and engaging, with all attendees participating multiple times throughout the session. All sessions are easily accessible on desktop, tablet or mobile, something very important for often-traveling sales employees. Video recordings of sessions are distributed to all members in case they were not able to attend.

**Figure 2: Ben Brooks, CEO and Founder of PILOT, Hosts a Bi-Monthly Live Coaching**



Source: MetLife



Figure 3: A look at What PILOT MetLife Women in Sales Members Shared

**PILOT** MY BRAND INVENTORY  
COMMAND YOUR CAREER  
2018-02-05 18:16:12

**HOW TO USE THIS INVENTORY**

1. Take a few minutes and read through the questions and your responses.

Does your brand help or hinder you?

2. Given your responses, "What do you think about your current professional brand?"

What's great about your brand?

What's missing or needs to be improved?

I have thought about and considered what my professional brand and reputation currently is.

Strongly Disagree

Strongly Agree

**How you see yourself:**

**Why It Matters:** A major contributor to how others experience you, is how you experience yourself. Thus, your outward brand to a large extent comes from inside you.

How would you describe your professional brand?	i have only worked at MetLife, for 16 years so my company is a big part of my brand. I am hard working, persistant and hold people accountable. I am guessing i am also seen as tough and someone who works to get what i want.
A few words that describe your style when interacting with others professionally.	Interested, questioning, conversational

**How you think others see you:**

**Why It Matters:** The way you think others experience you, individually and collectively, influences your behavior. Just remember, this is just what you "think" they see, not what they actually see.

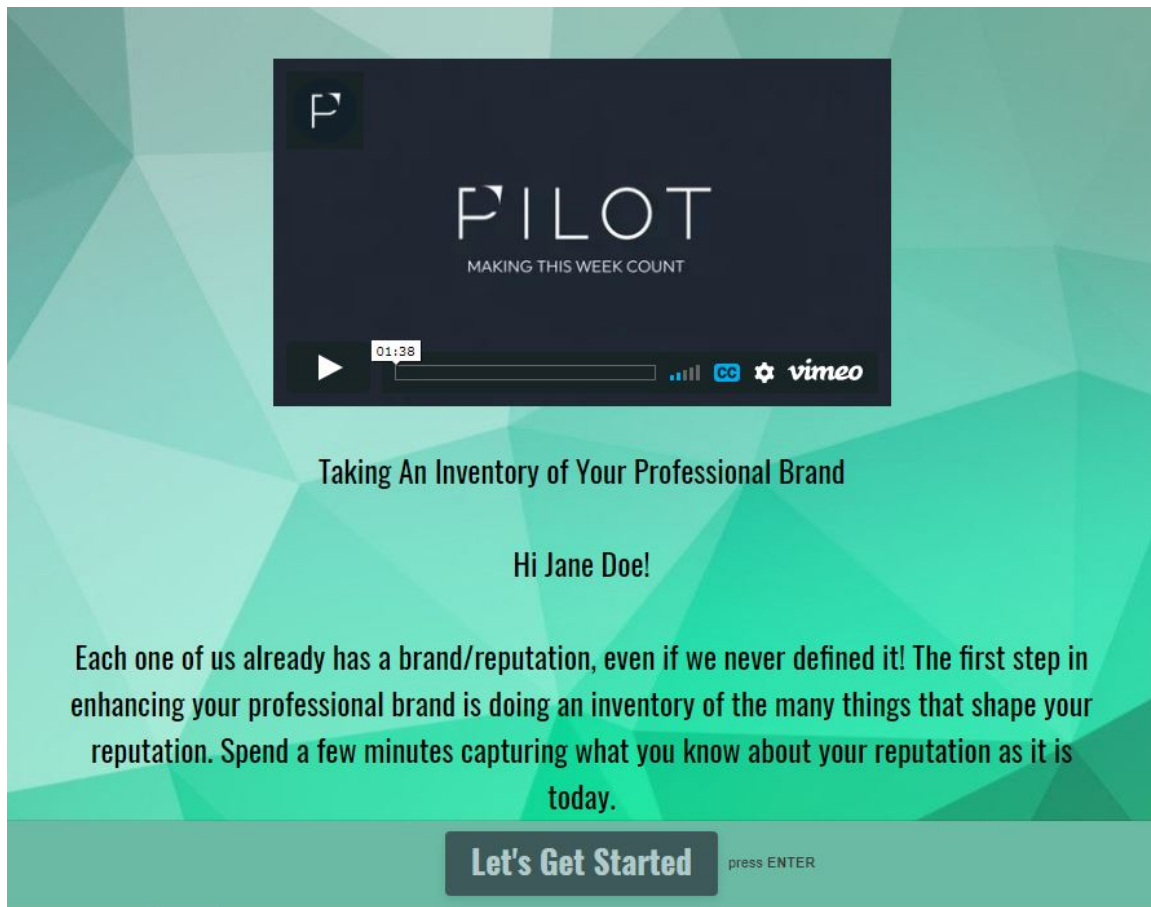
What do you think others know you for/as, professionally?	A group insurance sales person, who branched out and tried something new a couple years ago
How do you think others describe you as a professional?	Hard working, consistent.
What do people frequently compliment you on or praise you for?	That I get things done. That I know the next steps and who to go to.

hello@pilot.coach @pilot.coach

Source: MetLife



Figure 4: A Look at What a PILOT Activity (Brand Inventory) Looks Like



Source: MetLife

## Adoption of the Program

The Women in Sales PILOT coaching program was designed for maximum adoption. Just like working with an executive coach, this program provided individual accountability to keep up with weekly coaching, starting with personalized email reminder then text-message reminders followed by phone calls with PILOT crew mates. These nudges were very effective as they were often met with member guilt that they were behind and appreciated the reminder that they needed to prioritize themselves and get caught up. PILOT is a sequenced program that while intended to be snackable is also binge-able, so when members are behind they can do multiple coaching activities in a row to get caught up.



Perhaps the best example of how valuable PILOT coaching is to a member is the fact that a Women in Sales member who was five months into the program went out on maternity leave but specifically requested a way to stay involved in PILOT during her leave. MetLife is very supportive of new parents and in no way suggested or encouraged the employee to do any work, including training and development, during this period. However, the employee came up with the idea and felt it would help to keep her engaged, sharp and in “in a good mindset” while she was away, and as such consistently participated during her leave.

## **Measurable Benefits**

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Overall , PILOT has made meaningful, tangible positive impact on MetLife’s business and the objectives of the program. A recently restructured senior management team now is gender balanced and a number of women have raised their hand to apply for leadership positions as momentum builds toward more women advancing into leadership.

PILOT has resulted in countless “snackable” actions (i.e., asking for feedback, getting invited to an important meeting, setting boundaries with work, forming closer relationships with colleagues, advocating for specific resources and changing how employees present themselves internally) that have increased employees’ satisfaction with working at MetLife. Even more compelling is that employees have a much clearer sense of what they need to be satisfied in their careers.

Below are quantitate and qualitative measures of the program from the most important audience — the members (end users) of PILOT coaching.



**Figure 5: Results From a Survey of MetLife Women in Sales Members**



Source: MetLife

## Overall

In a member satisfaction survey conducted by PILOT following Women in Sales members' first three months with PILOT, 100% of MetLife's participants said that they would like to continue PILOT coaching. PILOT has an extensive curriculum and is continuing to create new and timely coaching activities to further serve the needs of PILOT members.

Figure 6: Net Promoter Score Based on the MetLife Women in Sales Cohort



Source: MetLife 2018

PILOT has served to meet this need and with additional coaching centered upon decoding oneself as a professional — strengths, skills, values, and experiences — PILOT members in Women in Sales can take an even deeper dive into what makes them uniquely powerful contributors at MetLife.

In addition, members also reported (prior to completing PILOT work), “My manager has a vast arc of control. Me and my team are very capable and low noise, so we tend to fall under the radar,” and “I do not know what processes, procedures, or approvals I need to get things done.” An upcoming series of coaching sessions focused on winning with

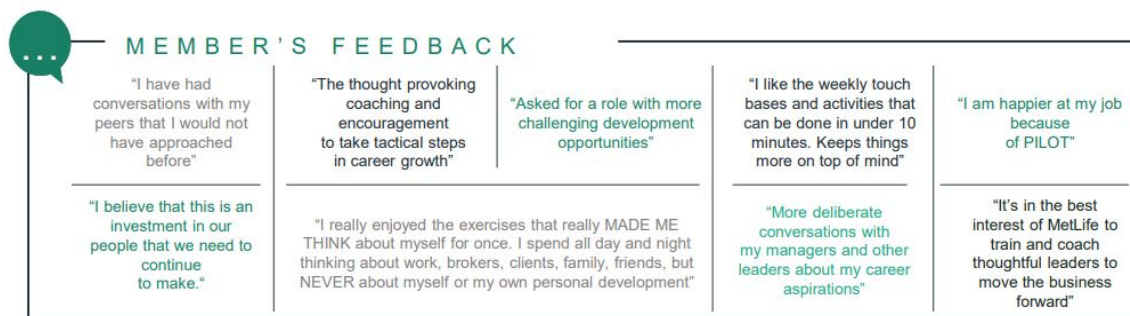


their managers — taking back the responsibility for that relationship and driving it to success, no matter the demands and constraints currently facing their manager — will directly address these challenges.

Finally, a series of quick-win activities such as an online reputation creator and professional bio builder gave PILOT members in Women in Sales demonstrative tools that they immediately put into action.

The Women in Sales members participating in the PILOT program have applied for sales leadership positions at a higher rate than those not participating in the program, resulting in increased representation of female sales leaders across the organization.

**Figure 7: Member Feedback.**



Source: MetLife



## About Brandon Hall Group

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Brandon Hall Group is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management. With more than 10,000 clients globally and more than 20 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

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