



Unum Turns Managers into Culture-Change Leaders

Unum

Best Advance in Leadership Development

September 2018



Company Background



Company-at-a-Glance	Unum
Headquarters	Chattanooga, TN
Year Founded	1848
Revenue	\$11 billion
Employees	10,000-24,999
Global Scale (Regions that you operate in or provide services to)	Highly distributed with multiple locations around the globe.
Customers/Output, etc. (Key customers and services offered)	Unum is a highly ranked insurance company that protects 33 million people and 181,000 businesses in the United States and Europe.
Industry	Insurance
Stock Symbol	UNM
Website	www.unum.com

Budget and Timeframe

Overall budget	\$100,000-plus
Number of (HR, Learning, Talent) employees involved with the implementation?	1
Number of Operations or Subject Matter Expert employees involved with the implementation?	1-5
Number of contractors involved with implementation	1
Timeframe to implement	June 2016 through present
Start date of the program	June 2016

Business Conditions and Business Needs

Founded in 1848, Unum protects 33 million people worldwide. Unum works with 181,000 businesses in the US and UK, providing financial protection benefits solutions.

With a multigenerational workforce and continually changing marketing conditions, Unum made significant changes to its culture, taking into account customers' voices when making company decisions, diversity appreciation and smart-risk implementation to drive innovation. In making these changes, Unum also took into consideration its managers and how they needed to understand and support the initiative, laying out some specific competencies that would need to be instilled in them. This included:

- Encouraging a vision aligning clear goals to corporate strategy.
- Creating followership among the marketplace.
- Developing and coaching employees to higher performance and a customer-centric mindset.
- Leading and supporting employees through change and foster a growth mindset.
- Setting leadership standards to be followed at all levels.

Historically, employees were promoted to managerial positions based on job proficiency and received limited training during the transition. A large number of managers knew the technical aspects of their job but lacked strong leadership skills.

The legacy manager training program currently in place was cumbersome and did not allow for proper training aligned with Unum's corporate goals. While it was helpful to individuals with managerial experience, the program's content had not been designed to train employees whose previous roles did not involve leadership nor did it support the pace necessary to bring new managers on board. Unum was at risk of losing staff, particularly millennial managers, as a result of this training model as the company did not adequately support current leadership and management needs.

Unum needed a leadership development program to equip its 1,200 managers with the skills to lead their company toward a collaborative future. To facilitate this change, Unum purchased Everwise, a platform to host the program, but did not have a learning and development team experienced with the platform to design the curriculum.

Overview

To address corporate and management strategy goals, Unum collaborated with The Training Associates' design team to create the Leadership Academy. This program was constructed to address four key competencies related to management and Unum's leadership strategy:

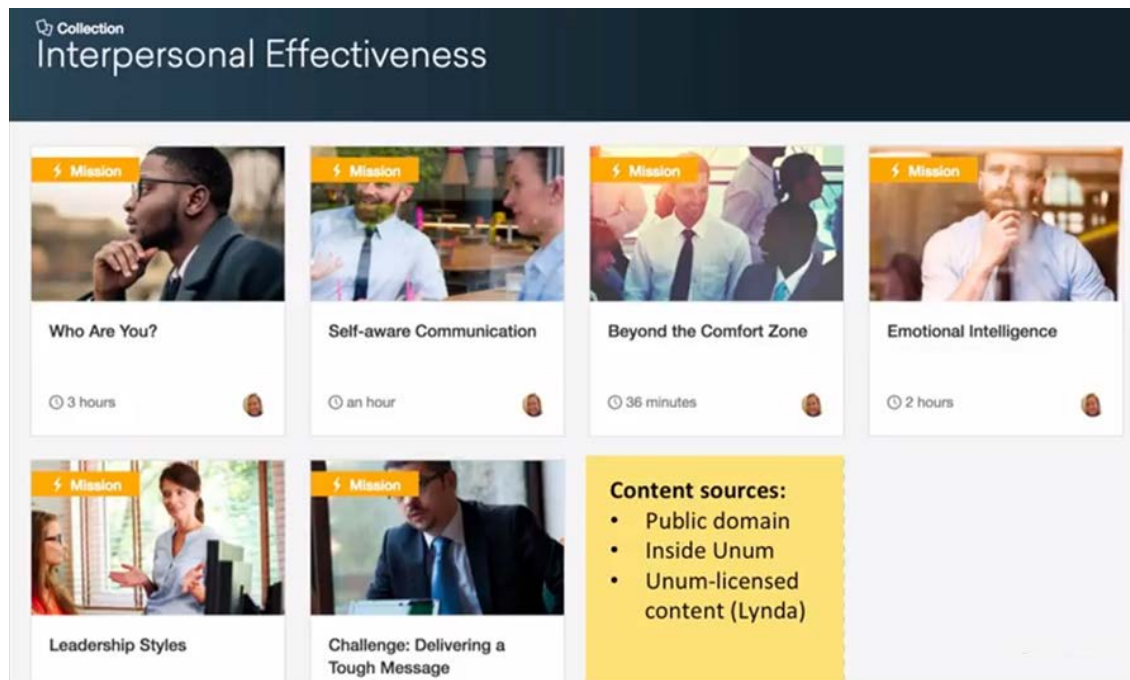
- Interpersonal effectiveness.
- Leading change.
- Elevating performance.
- Strategic decision-making.

These competencies were set to facilitate the professional growth and position management staff to drive a cultural change. The program was designed to be accessible for learners of varied age groups, skill levels and management styles.

Unum hosted the platform on Everwise. To create the content, Unum utilized public domains, already existing Unum created content and content from Lynda.com that had been previously purchased.

The Manager Learning Experiment, a pilot of the Leadership Academy, was used to test the success of the program and focused on one of the four core competencies: interpersonal effectiveness. Fifty managers were selected to take part in a six-week learning experience, which was divided into six missions. (Each mission was one to two hours long.)

Figure 1: Interpersonal Effectiveness



Source: Unum

The program was highly successful at:

- Addressing Unum's core competencies.
- Imparting leadership skills to Unum's multigenerational management staff in line with its leadership strategy.
- Reinforcing the subject matter for the participants.
- Teaching vital real-time skills that were applicable to the teams managed.

Design and Delivery of the Program

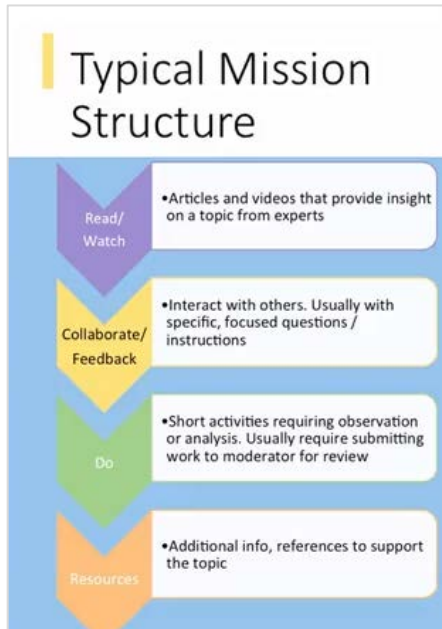
Unum launched the pilot in January 2016 to a select group of 50 managers. The creation of Unum's Leadership Academy began with a team of senior managers representing all internal functions coming together to identify the four key competency areas the program would need to address. TTA's creative team designed a learning system to facilitate the professional growth positioning management staff to drive cultural change. The program was designed to be accessible for learners of varied age groups, skill levels and management styles.

In January 2016, the pilot was launched on interpersonal effectiveness. The 50 managers were divided into peer groups of seven to eight people and were led through the six-week course consisting of six missions. Each week the peer group completed one mission.

Each mission was broken down and required about one to two hours of time. A typical structure from the self-aware communication mission is:

- Videos or articles to give a broader understanding of the topic.
- Collaboration to get questions answered on the information from peers.
- Activities for the managers to apply what they learned.
- Resources to allow the manager to reference and continue to use the information as they go about their day-to-day responsibilities.

Figure 2: Typical Mission Structure



Source: Unum

Teams were given access to an expert moderator who provided feedback, guidance and expertise along the way. There also was an experienced facilitator involved to answer general questions and provide Everwise with overall support throughout the program.

Adoption of the Program

The Manager Learning Experiment was first tested in 2016 as a six-week-long pilot with an audience of 50. Unum had embraced the Leadership Academy and it became a sought-after resource among managers — it was clear that the team-oriented nature of the new learning system had fostered a culture of collaboration. Managers in the program were meeting with their supervisors and teams to review their experience. As a result, teams were reaching beyond individual business units and offices to work with one another.

Unum and TTA worked together to evaluate the effectiveness of the program through learner and facilitator feedback. A TTA learning strategy consultant worked one-on-one

with Unum's creative team, meeting every six weeks to go over feedback from participants and instructors.

Through this process, the team uncovered:

- The most conducive time for running the program.
- How much information should be included in self-study modules.
- The level of collaboration that learners would prefer to have in their learning experience.

Changes were made to the program based on the feedback. The takeaways from the pilot and feedback helped drive better results as they moved forward with the Leadership Academy.

The takeaways include:

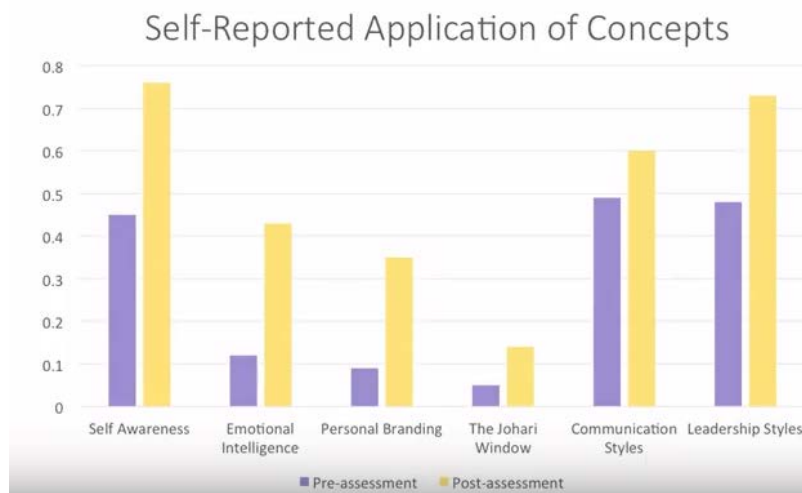
- Manager preference varied between cohort driven and self-paced exercises. Therefore, Unum realized it would need a flexible program to allow for both in each mission.
- Delivering the information and activities in smaller chunks of time was extremely effective as manager time is limited; this allowed them to apply the information directly to their jobs, taking less time away from their daily task lists. Real-time application really drove engagement.
- It is helpful and important to have a platform that can be updated in real time. There were times where learners reached out to Unum with questions and they were able to adjust efficiently and not affect the flow for the rest of the users.

Measurable Benefits

The pilot was highly successful. Since the pilot closed, a pole of management staff at Unum revealed:

- Confidence levels rose from 45% at the beginning of the program to 70%;
- Team engagement increased noticeably as managers who participated in the program shared their experiences with their teams; and
- Business units, which had previously become information silos due to the lack of standardized practice and communication, began to collaborate with other business units and office locations on a global level.

Figure 3: Application of Lessons Learned



Source: Unum

Unum gauged the impact of the program by manager self-reporting and polling and gathered information on what improvements needed to be made. From the very beginning of the design process, the Leadership Academy was centered on managing the skills that would encourage interpersonal and inter-organizational synergy. When assessing the effectiveness of the Leadership Academy, Unum focused entirely on

tangible individual and cultural change. The Leadership Academy provided a consistent, accessible learning resource to managers of all ages and skill levels company-wide.

Overall

The biggest learning experience that Unum's executive leadership team gathered from the project was that its company culture was directly affected by its managers at all levels. The drastic transformation of the way teams worked and the company functioned was largely due to the introduction of a formalized leadership program. The consistency of training and communication between managers at Unum's geographically dispersed locations meant company-wide agility.

Unum's original goal for this program was solely a source for managers. After further review, however, Unum found that it was appropriate for much more. The company has since added it to its Accelerated Leadership Program, allowing those aspiring to be leaders to take the pilot. This is a huge benefit for Unum and will align with its leadership strategy.

Development of the Leadership Academy is ongoing. Unum has continued to actively add additional elements that facilitate networking between managers office-wide, as well as look at other applications for the program outside of the original purpose. Other areas of the business already are interested.

Through participant and instructor feedback, Unum determined an overarching desire for more inter-office communications. The new addition is expected to further open up avenues for managers involved with the program to network, work together and share ideas.

Unum's executive leadership team is focused on the continued evolution of the program with an emphasis on developing it as a full-lifecycle learning resource to bring managers from leadership training at the beginning of their career to eventually teaching mentorship skills to senior management.

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