

Allianz's Inclusive Meritocracy Virtual Classroom Helps All Employees Understand Company Strategy

Allianz SE and TATIN Institute for Strategy Activation

Best Unique or Innovative Learning and Development Program

November 2019



Company Background



Company-at-a-Glance	The Allianz Group is a global financial services provider with services predominantly in the insurance and asset management business; 92 million retail and corporate clients in more than 70 countries rely on its knowledge, global presence, financial strength and solidity. In fiscal 2018, more than 142,000 employees worldwide achieved total revenues of €130.6 billion and an operating profit of €11.5 billion.
Headquarters	Munich, Germany
Year Founded	1890
Revenue	€130.6 billion in 2018 for the whole Allianz Group
Employees	142,000
Global Scale	Operating in more than 70 countries on all continents
Customers/Output, etc. (Key customers and services offered)	Insurance and financial services: 92 million customers including individuals, companies and organizations; asset management over €1.436 billion
Industry	Financial Services and Insurance
Stock Symbol	ISIN DE 000 840 400 5; German stock exchange: WKN 840 400, ALV (DAX)
Website	www.allianz.com

Company Background

TATIN INSTITUTE FOR STRATEGY ACTIVATION

Company-at-a-Glance	<p><i>"Strategy activation is not everything, but without activation every strategy is nothing."</i> This was the conviction in the hours of the foundation of the TATIN Institute for Strategy Activation and it still is today. And so, a few years ago TATIN set off on the journey to conquer the planet of strategy activation. Today, the TATIN Institute for Strategy Activation, based in Munich and with offices in Basel, Hong Kong and Zurich, is a consulting boutique for companies and non-profit organizations that are convinced that the value of a strategy is no longer measured only by its sales targets, but also by the number of followers. The more people one can convince that the strategy will work, the more valuable it will be.</p>
Headquarters	Munich, Germany
Year Founded	2013
Employees	24
Global Scale	Europe, Asia, and USA
Customers/Output, etc. (Key customers and services offered)	Companies and nonprofit organizations
Industry	Consulting
Website	www.strategyactivation.com

Budget and Timeframe

Overall budget	€350,000
Number of (HR, Learning, Talent) employees involved with the implementation?	Two for central project management and global implementation; approximately 70 local learning employees facilitated sessions and marketed and made platform available in global locations; approximately 10 participated in translation
Number of Operations or Subject Matter Expert employees involved with the implementation?	Six SMEs; one data privacy; two IT security; 30 works council representatives
Number of contractors involved with implementation	Four professional translators
Timeframe to implement	Nine months
Start date of the program	September 2018

Business Conditions and Business Needs

The Allianz Group seeks to position itself as the world's most trusted financial service provider, but the world is changing rapidly and financial services along with it. The Renewal Agenda enables Allianz to keep building on its strong foundations and reinforce its leading position by focusing its efforts in five fields of action: True Customer Centricity, Digital by Default, Technical Excellence, Growth Engines and Inclusive Meritocracy. Inclusive Meritocracy is Allianz's target culture; the culture has to evolve toward a more agile, customer-oriented, and collaborative mindset.

Inclusive Meritocracy at Allianz can be described by three principles:

- People and Performance matter in a culture of Inclusive Meritocracy;
- The "what: and the "how" count and define individual performance at Allianz; and
- 4x3 People Attributes (four concrete principles underpinned by four behaviors each for expected culture and behavior in the company)

These set the aspiration for how each and every employee should act. In addition, these People Attributes (and the behaviors that underpin them) are:

- Entrepreneurship (action on opportunities, take risks and promote a culture that allows honest failure; take ownership and responsibility; embrace innovation);

- Customer and Market Excellence (foster state-of-the-art technical/operational knowledge and strive for simplification, strive for excellence at every touch point with the customer; be the benchmark);
- Collaborative Leadership (empower the team and provide purpose and direction; develop people, provide feedback, and care for employee well-being; collaborate and exchange best practices); and
- Trust (act with integrity, honor commitments and tell the truth; act transparently and promote corporate social responsibility; foster diversity and inclusiveness).

In parallel to the company's larger strategic initiatives, HR within Allianz is currently undergoing a large-scale HR transformation project that sees the function evolving completely until 2021. This transformation effort brings with it both a new system (one global HR system, including a learning management system) and a new structure. In the area of learning and development HR transformation entails a move toward one global learning function, AllianzU, which serves as the corporate university and a single global "home" for all learning and development activities in the company.

While the transition toward this new structure is ongoing and not yet fully implemented and staffed, the key principles of providing harmonized learning and development opportunities to each and every employee worldwide (with the idea that learning is a privilege, not a right, and should be available to all) are in place. Along these lines, the Inclusive Meritocracy Virtual Classroom is a lighthouse initiative that serves as a visible signal to the global employee population that a positive change is under way.

Many strategic change initiatives focus exclusively on leadership, but Allianz aims for total cultural transformation at all levels. After starting the Inclusive Meritocracy Virtual Classroom (IMVC) as a moderated blended-learning experience for the global executive population of 5,000, the IMVC was completely redesigned, leveraging feedback from the executives, to provide a learning experience that enables each and every employee to experience the new culture and develop an understanding of how he/she/they can embody Inclusive Meritocracy in their daily work.

In addition to delivering a learning experience that enables employees to live the People Attributes, the IMVC supports the Digital by Default strategy, a second key lever of the company's Renewal Agenda with the goal of simplification, harmonization and a stronger customer experience through digital processes and tools. Prior to the IMVC, Allianz had no internal trainings (digital or traditional) that were available globally. With such a massive scope covering all employees, making this digital learning initiative a lighthouse initiative by supporting digitalization at the same time as cultural shift.

Overview

The web-based IMVC platform allows users to stop any exercise at any point and resume at the exact place they left off; a simple overview of the five rooms and the progress is available on the landing page of the IMVC. A user is able to see how many of each room's three exercises has been completed (indicated by the stars; all exercises have been completed in the pictured example below), as well as an overview of the content and an estimated time of completion (the info bubble at the top right of each room in the pictured example) before making a selection.

Figure 1: Start Page for a User Who Has Completed All Exercises



All illustrations provided by Allianz

A first version of the IMVC with fewer technical features (for example, exercises could only be completed once) was rolled out to the global executive population (approximately 5,000) in 2017; the decision was then made to make the opportunity available to all employees at a massive scale. The new IMVC was launched enterprise-wide (all 142,000 employees, all 200-plus locations in 70 countries) in five languages (English, German, Spanish, French and Italian) in September 2018. The virtual classroom contains five learning “rooms” on the topics of Changing Perspectives (actively seeking new viewpoints, overcoming unconscious bias, and putting oneself in the customer’s shoes), Motivation and Engagement (identifying one’s own motivators and demotivators, driving engagement in teams), Self-Reflection (reflection on one’s own strengths and shortcomings, leadership in a digital age, and ways to create impact in any working environment), Open and Honest Communication (important aspects of effective communication including pitfalls and challenges, as well as how to assess nonverbal cues and emotions in communication), and Collaboration (the roles everyone plays in a

collaborative group, finding and motivating others to collaborate on a project, and playing “Collaboration Poker” to discover ideal project roles).

Organizational objectives such as the company strategy, specifically Inclusive Meritocracy (by offering a learning experience specifically designed to foster a cultural shift) and Digital by Default (by offering a large-scale, high-quality digital learning experience), and employee engagement (measured annually by the Allianz Engagement Survey) are directly supported by the IMVC. In all entities each year, teams work together following the engagement survey to identify challenges and strengths, leveraging the results of the survey to take action. The IMVC was concretely linked to engagement survey follow-up in 2018, with all team leads globally receiving a follow-up action guide that linked various dimensions of the engagement survey to specific learning exercises or complete rooms in the IMVC.

Figure 2: Follow-up Guide




Quick Overview of All Offerings

Dimension	Course	Place	Audience	Time required
IMIX (Inclusive Meritocracy Index)	Collaboration	IMVC	Teams	2 hours
	Open and Honest Communication	IMVC	Teams	2 hours
	Noble Failure with Oliver Bäte	IMVC	Teams	15 minutes
	Inclusive Meritocracy As A True Challenge And Opportunity For Today And The Future	IMVC	Teams	15 minutes
	Create a growth mindset with feedback	LinkedIn Learning	Teams	4.5 minutes
	Customer experience ride	IMVC	Teams	20 minutes
	From the Diary of a Colleague: What's on your mind?	IMVC	Team	15 minutes
	The Color Changing Card Trick	IMVC	Team	15 minutes
	Creating a high performance culture	LinkedIn Learning	Managers	1 hour 4 minutes
	Directors Meeting Exercise	IMVC	Managers	15 minutes
	Open and Honest Communication	IMVC	Managers	1.5 hours
	Leading a Customer Centric Culture	LinkedIn Learning	Manager	36.5 minutes
	Diversity and inclusion in a global enterprise	LinkedIn Learning	Managers	54 minutes
	Business ethics	LinkedIn Learning	Managers	1 hour 28 minutes
	Allianz Essentials: Collaboration & Co-creation learning path	LinkedIn Learning	All employees	5 hours
	Having Difficult Conversations	LinkedIn Learning	All employees	2 hours 17 minutes
	Communication within Teams	LinkedIn Learning	All employees	1 hour 8 minutes
	Giving and receiving feedback	LinkedIn Learning	All Employees	49 minutes
	Creating a Positive Customer Experience	LinkedIn Learning	All employees	46 minutes
	The Ultimate Inclusive Meritocracy Self-Test	IMVC	All employees	10 minutes
	Inclusive Meritocracy Moments in Everyday Working Life	IMVC	All employees	15 minutes

The follow-up guide makes taking action on engagement survey results easy by providing exercises per engagement survey dimension for all audiences (teams, managers and individuals).

The IMVC was designed and implemented with the goal to provide a new, fresh learning opportunity to all employees and to drive the company culture. Furthermore, the goal was established to improve on the applicability and effectiveness of the first, executive-only version of the IMVC as rated by participants. All of these goals have been met, with

an increase in NPS of 7.5 and the average exercise rating increasing 0.3 (on a scale from 1 to 10); feedback on the learning experience with the IMVC has been overwhelmingly positive from senior stakeholders, learning and development employees responsible for the initiative globally, social partners such as works councils, and participants.

Due to the methods of engagement (for example, that it is often used in groups, with untraceable participation and that participation is mandatory), no further metric goals such as participation rates were established.

Design of the Program

Allianz is a globally diverse company; therefore, a guiding principle for the design of internal learning experiences is always, "Globally consistent, locally relevant." In this vein, the learning content, as well as the bespoke platform, were co-developed by Allianz and TATIN with regular feedback loops and active participation by learning experts, business leaders and other employees in a number of operating entities around the world in all regions.

The IMVC was first launched as a different experience in 2017, with mandatory participation for the global executive population of approximately 5,000. Participants completed that version of the IMVC in moderated sessions, either via web conferencing or in person. Feedback from participants indicated a clear wish to be able to deliver a similar experience to their teams, but the trained-facilitator dependent approach was not scalable to a population of 142,000; a radical re-design, essentially from the ground up, was required.

Design began by identifying critical topics for the business; this entailed consulting with senior leaders, considering company-wide engagement survey results, and closely involving the strategy office as, well as the Inclusive Meritocracy project team of Allianz. Once high-level topics and goals were identified, core elements of the content and design were collected via structured interviews, online surveys and focus groups. This yielded a high-level overview of suggested "rooms" in the virtual classroom (themed learning areas) with suggested exercises for each room, which was shared with the global learning community, senior leadership, and strategic and Inclusive Meritocracy teams for constant alignment with global business needs.

When the first version (the minimum viable product or MVP) of the platform was ready, test sessions were conducted with participants from Australia, Germany, Poland, Ireland and the U.S. (MVP was only available in English). Feedback on all aspects of the experience was considered: relevance to different populations, user experience, technical aspects, learning outcomes, and interest. Based on this feedback, the platform and contents were modified and re-tested.

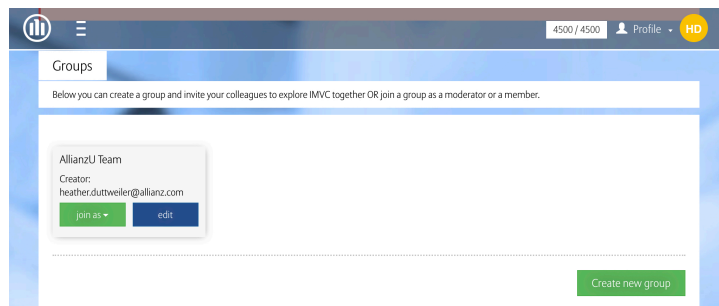
Once the pilot testing with the MVP was complete, translation efforts began. This process was a collaborative effort between translators from vendor partner TATIN and local learning employees; this collaboration ensured that the final product used locally relevant, strategic language employees would be able to identify with. All five languages were made available to the global population in September 2018, just before the completion of the annual engagement survey.

Delivery of the Program

The IMVC is a highly interactive web-based platform available in five languages and accessible to all employees on any device (PC or mobile/tablet, inside or outside the company network) since September 2018. Employees gain access by registering themselves with their company email addresses, which keeps the platform restricted to employees only but easy to access.

The method of content consumption in the IMVC is flexible. Ideally, participants would participate in moderated group sessions. In contrast to the executive-only first version of the IMVC that required trained facilitators, a moderator requires no training can be any team member or other individual who wants to facilitate a session; becoming the moderator in the platform is as easy as placing all participants, including oneself, in a group using email addresses or names and choosing to join that group as the moderator so that they can see at which point of an exercise participants are at. The group also serves the purpose of opening the chat room for group participants only, enabling participants to quickly share when they are done with a task, ask questions or raise discussion points without potentially disturbing the focus of other group members by speaking. Creating the opportunity for and encouraging anyone to be a moderator was intentionally designed to drive the inclusion aspect of Inclusive Meritocracy; it was undesired that only trained facilitators (usually from HR) or managers would lead discussions. To support the moderators, prompts for facilitating progress through the exercises and guiding discussion appear in the context of each step of the exercises for the moderator only.

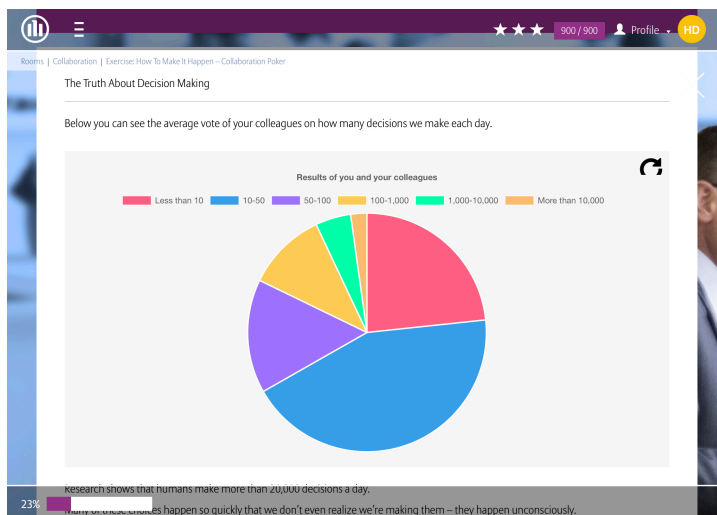
Figure 3: Group Creation and Moderator



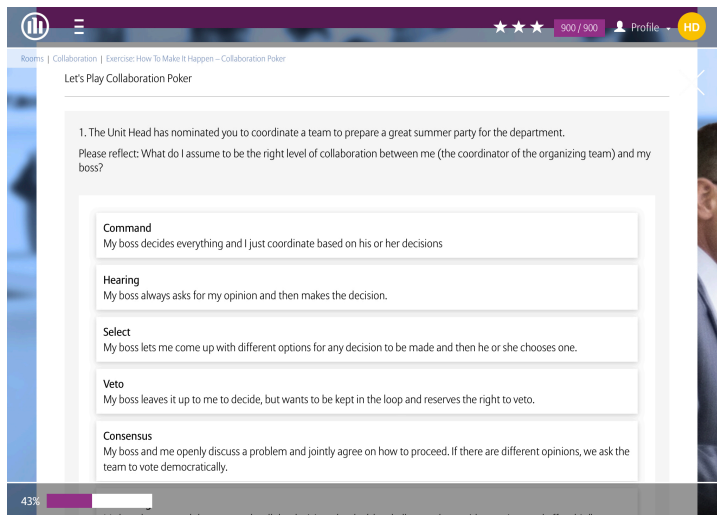
Anyone can easily create groups and instantly fill the role of moderator.

The IMVC is optimally suited for use as a moderated, virtual team-learning experience; that is, teams or working groups, together with select a room or exercise and proceed through the content as a group. The five rooms may be completed in any order, allowing teams the flexibility to focus on the topics most relevant for themselves in the moment, whether that be, for example, based on engagement survey results, struggles with communication within the team, or a need for new ways of collaboration. Self-reflection and discussion questions allow all of the content to be contextualized for immediate relevancy and to support learning transfer. Furthermore, the platform includes social elements, including sharing best practices on relevant topics to the “Best Practice Cloud,” visible to all employees, or by comparing results to knowledge checks or survey questions.

Figure 4: Decision-Making Question Results Comparison

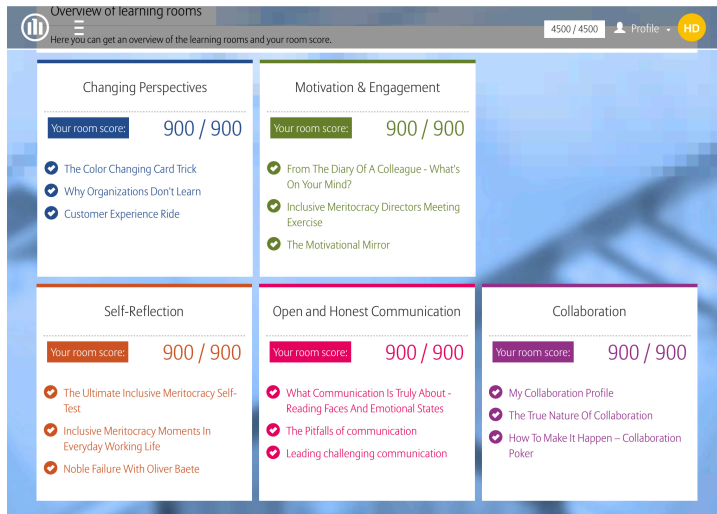


Comparison of results from all users on a question about how many decisions humans make every day.

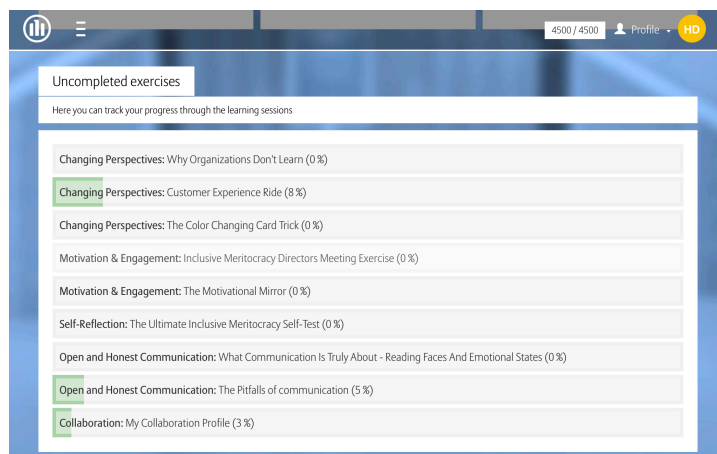
Figure 5: Playing Collaboration Poker

Playing Collaboration Poker: reflection questions on preferred collaboration style. The answers are selected and carried through the exercise to provide a report to the user at the end.

While the group approach offers great benefits to teams, the IMVC can also be completed individually as well, with the interactive nature of each exercise driving higher engagement when compared to PowerPoint-style eLearning. The earning of points for exercise completion is a gamification feature included to add a fun element to course progression for individual learners (although the points are also earned in the group learning experience). A user may stop an exercise at any point and resume later exactly where they left off, enabling just-in-time learning and the flexibility needed that allows employees to learn during their working time when distractions may arise. In addition to the overview of progress on the start screen, a user may see their completed exercises at any time on the profile page.

Figure 6: Overview of Exercise Completion


Overview of completion for a user who has completed all exercises, as seen on the profile page.

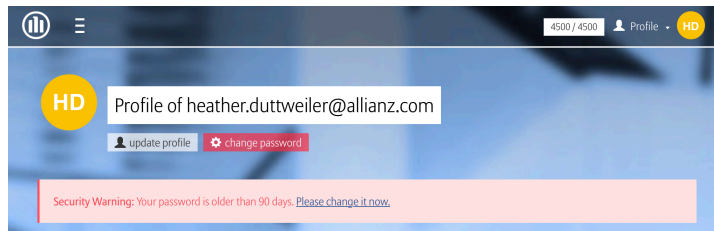
Figure 7: Overview of Exercise Progress for the Same User


Exercises may be repeated as many times as desired and progress is tracked; this is an overview of exercise progress for the same user (all exercises already completed) as in the example above.

At the end of each exercise, participants have the option to share feedback on key takeaways, topics they felt were missing (to drive constant improvement of the platform), and a rating of the exercise on a scale from 1 (not helpful to me in my daily work) to 10 (very helpful to me in my daily work). This feedback empowers the AllianzU team, together with TATIN, to make constant improvements to the content, address gaps and resolve technical issues. Furthermore, the feedback supports the company strategy as it provides a constant employee voice with regard to the cultural transformation.

In a global organization, achieving one standard outcome that addresses all local requirements always presents challenges and the IMVC was no different. First, the development of the IMVC took place at the same time the new GDPR data privacy legislation came into effect in Europe; this meant stricter assessments and regulations on both data privacy and IT security aspects of the experience. The entire platform, not only the content, was therefore rebuilt from its first executive-only version to meet new requirements and keep privacy and security in the DNA of the product. To make the change process as smooth as possible, internal experts from both data privacy and IT security played an active role in the development process, ensuring the platform was designed with requirements in mind rather than organizing large efforts to solve problems later. A number of features are included in the platform to ensure the highest levels and conformity to the latest standards of data privacy and IT security.

Figure 8: IT Security Example



IT security example: users are required to reset their passwords every 90 days.

Another change management effort internally comes from collaboration with works councils and other employee representative bodies in not only local entities, but also at country or regional levels. In many countries, including Allianz's largest operating area of Germany, the approval of learning initiatives by employee representatives is a requirement prior to launch. These bodies act in the interest of the employees, but this can often mean differing viewpoints from the learning function; for example, on the evaluation of learning using assessments/tests, mandating participation or the tracking of individuals' progress through material. A further issue of high importance is the fair availability of learning opportunities to all employees in light of a diverse IT landscape as well as different local policies on learning during working time. To win support for the project and to deliver an optimal product with the best interest of employees in mind, works council and other employee representatives at various levels were consulted throughout the process, ultimately leading to the necessary approvals without any delay. The IMVC is available to all employees with no restrictions and voluntary participation, works on all devices, and has no tracking of individual progress except for the user themselves.

Finally, as this was the first global, team-based learning experience in the company, change management efforts were required for the delivery of the program/platform.

Arguably the largest challenge faced, it was overcome by integrating the use of IMVC into existing business practices: engagement survey follow-up, pre-/post-work for leadership training programs and company onboarding programs to provide new-joiners with the experience of the new company culture from their first days. Supporting materials are easily accessible within the platform as well as via other channels (intranet, email distribution); these materials play a key role in providing employees with information they may need to experiment with learning methods that are new to them.

Figure 9: Leadership Academy – Inclusive Meritocracy Virtual Classroom 2.0



LEADERSHIP ACADEMY

Inclusive Meritocracy Virtual Classroom 2.0

Becoming a moderator

LEARN.DARE.GROW



The moderator guide provides step-by-step instructions to support users with how to create groups, facilitation tips and tricks, and more.

Measurable Benefits

The IMVC reached employees in 46 countries and almost all of Allianz's operating entities — and the numbers speak volumes: the complete program has an NPS of 83 (+7.5 versus the first, executive-only IMVC) and the average exercise rating is 7.9/10 (1 = not helpful to me in my daily work, 10 = very helpful to me in my daily work).

The number of logins on the platform is nearly 14,000; this, however, is not representative of total participation. Due to the fact that all employees have access and Allianz does not have a limited number of licenses, the IMVC can be and often is accessed in groups, with teams; for example, sitting together in a room and going through exercises as a group

with only one user logged in and the experience projected on a beamer. This was the case, for example, in Allianz Italy where all (approximately) 5,000 employees experienced the IMVC in late 2018.

Social partners within Allianz (works councils and employee representatives) also highlight the IMVC internally as a prime example of the future of learning: social, digital, and available to all. Allianz is proud that the IMVC fully meets all accessibility standards, providing the same fantastic learning experience to all, including employees with disabilities. It has been viewed as a key step toward providing company-critical learning opportunities to employees at each level of the organization and a strong symbol of a shift towards a new company culture beyond Inclusive Meritocracy and towards a culture a lifelong learning.

In March 2019, Allianz unveiled the “Renewal Agenda 2.0,” an update (but not completely new strategy) to the goals/objectives of the company strategy. The design of this strategic update considered participant feedback from both versions (executive-only and the current instance highlighted in this application) of the IMVC to increase relevancy of the strategy to the employee base.

Allianz looks forward to seeing the impact of the IMVC on engagement results following the next annual engagement survey in September 2019.

Overall

Allianz has never had a technical solution for learning like the IMVC before. Furthermore, the focus on cultural change is taking place for the first time; therefore, a number of key lessons have been learned.

First, many employees, despite having very digital personal lives, are not yet accustomed to such a digital-learning format. While eLearning has been present for years within Allianz, it has primarily been employed for compliance-like learning objectives, creating a bit of stigma about the enjoyability and effectiveness of digital learning; in addition, the acceptance of digital tools varies widely from country to country. A key learning for the AllianzU team was identifying ways to bridge the gap between the known, traditional learning experiences such as face-to-face development programs and innovative digital, blended tools by positioning them as complements to one another; feedback from participants in these scenarios was that they found it eye-opening to see how a digital experience could enhance their learning in such an interactive way.

Second, with the IMVC being the first team-based learning tool available within the company, the AllianzU team was able to observe the benefits of creating shared learning experiences for teams, boosting team learning, performance, and relationships rather

than maintaining an individual focus; this aligns well with agile principles focusing on elevating team performance as a whole rather than the individual parts (people).

Third, the feedback employees share in the “Best Practice Cloud” (social learning area of the IMVC) and via the feedback tools has been invaluable already, as described above with its integration into the design of Renewal Agenda 2.0, and will continue to be; this information is shared with key stakeholders to ensure that other company-wide change initiatives target the right areas and set the right tone as Allianz continues to work towards shifting its people and digital cultures.

Looking ahead, the experiences with the IMVC will support the shaping of future learning initiatives. The AllianzU platform is currently looking into ways to integrate other learning experiences on the platform to leverage the interactive format and reporting tools; one initial idea is for the onboarding of new leaders in the company.

Allianz expects the IMVC to continue to play a key role in shifting the culture of the company, with updates to reflect the company's strategy as it evolves (as it did in 2019 with the Renewal Agenda 2.0) and functioning as an engagement tool.

About Brandon Hall Group

Brandon Hall Group is an 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 25 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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