



# Mercer’s 4C’s Approach Transforms Team Dynamics in Post-Pandemic Era

Mercer

Best Competencies and Skill Development

November 2024



## Company Background



Company-at-a-Glance	
<b>Headquarters</b>	1166 Avenue of the Americas, New York City, New York
<b>Year Founded</b>	1945
<b>Revenue</b>	\$5 billion
<b>Employees</b>	25 000
<b>Global Scale (Regions that you operate in or provide services to)</b>	130 Countries in Europe, Asia Pacific, North and South American regions
<b>Customers/Output, etc. (Key customers and services offered)</b>	Mercer helps clients around the world advance the health, wealth, and performance of their most vital asset – their people. Clients include international companies of all sizes serving the leaders, HR managers and employees with the solutions, services and insight they need to make the most of their benefits.
<b>Industry</b>	Consulting and benefits/HR administration
<b>Stock Symbol</b>	MMC
<b>Website</b>	<a href="http://www.mercer.com">http://www.mercer.com</a>



## Budget and Timeframe

Budget and Timeframe	
Overall budget	0
Number of (HR, Learning, Talent) employees involved with the implementation?	6
Number of Operations or Subject Matter Expert employees involved with the implementation?	4
Number of contractors involved with implementation	0
Timeframe to implement	12 months
Start date of the program	09/01/2023

## Fit to the Needs

Effective teamwork was identified as vital for alignment, clear objectives, sharing best practices, learning among team members and across teams, and delivering excellent service. To ensure successful teamwork, it was crucial for all members to communicate effectively, develop self and mutual awareness to optimize their strengths and improve weaker areas, adapt to colleagues with different profiles, experience a unifying sense of purpose, understand the benefits of working together versus making decisions individually, develop empathy, and support each other's needs.

Psychological safety was also recognized as a key factor for effective teamwork. Research by Amy Edmondson, a professor at Harvard Business School, has shown that psychological safety is a key predictor of team success. Psychological safety refers to the shared belief that team members feel safe to take risks, be vulnerable, and express their ideas without fear of negative consequences. By fostering psychological safety, teams can create an environment that encourages open communication, collaboration, and innovation.



The initiative aimed to address these areas of improvement and was conducted with all teams in Wealth Analytical Services located in Portugal. Prior to its implementation, focus groups were conducted with people managers, frontline leaders, and specific roles in the organization to identify weak areas such as communication, adaptability to differences, and clarity regarding the value of teamwork. Alignment within a team is crucial for achieving common goals and objectives. When team members are aligned, they have a clear understanding of their roles, responsibilities, and the overall purpose of their work. This alignment allows for better coordination, cooperation, and synergy among team members. According to Patrick Lencioni, author of “The Five Dysfunctions of a Team,” a lack of alignment can lead to confusion, conflict, and a decrease in overall team performance. Therefore, initiatives that promote alignment, such as teambuilding programs, are essential for enhancing team effectiveness.

These areas aligned with Mercer’s people management strategy, known as the 4 C’s: Conversations, Care, Clarity, and Connect.



The initiative was also a response to the aftermath of the pandemic and the challenges faced by teams, with over 50% of employees working remotely, which hindered connection, clarity, care, and communication among team members and across teams.

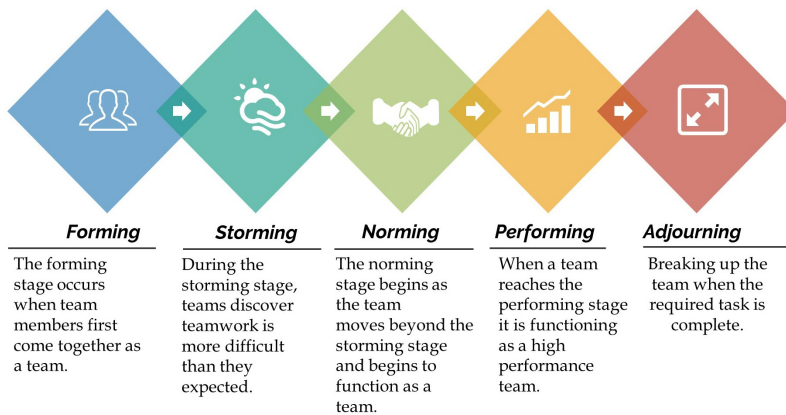
Effective communication is a cornerstone of successful teamwork. It enables team members to share information, exchange ideas, and collaborate effectively. Research by Deborah Tannen, a professor of linguistics, has highlighted the



importance of understanding communication styles and preferences within a team. By recognizing and adapting to different communication styles, team members can improve their ability to convey information clearly, resolve conflicts, and build stronger relationships. Initiatives that focus on improving communication skills, such as workshops and exercises, can greatly enhance team dynamics and performance.

The initiative served as an anchor moment for the teams, where all members gathered in the office for the teambuilding activities. People managers participated in the teambuilding to gain a deeper understanding of their team members beyond their professional roles.

The initiative aimed to help team members assess their team's maturity stage (Forming, Storming, Norming, Performing, Adjourning) and identify the ideal state for their team, thus identifying the team's gap. This model, developed by Bruce Tuckman, highlights the natural progression of teams as they form, establish norms, work through conflicts, and eventually reach a high-performing state. Understanding these stages can help teams navigate challenges and facilitate their development. Initiatives that address team dynamics and provide opportunities for team members to reflect on their current stage and set goals for improvement can accelerate the team's progress towards high performance.



Together, each team defined an action plan to be implemented in the following months, addressing team challenges and implementing concrete actions by themselves, managers, and the organization. Follow-ups were conducted to track progress on the actions taken.



Using the design thinking methodology, conducting focus groups that allowed us to create personas, experience maps, empathy maps, prioritization matrices, problem statements, and goals, we were able to identify and develop a set of objectives to be achieved through teambuilding.

By the end of this initiative, and after implementing the developed action plan, team members from different teams should be able to:

- Recognize the relevance of anchor moments, where the team comes together and gets to know each other beyond professional aspects.
- Explain how team preparation is a key factor for success, contrasting the idea that a team can form and grow without a strategy.
- Identify success factors within their team by assessing the satisfaction level of team members regarding skills, behaviors, or other aspects.
- Use empathy to understand others and their needs, seeking to support them.
- Identify their own tendencies in communication, time management, work organization, etc., recognizing strengths and areas for improvement.
- Identify the tendencies of different team members, adapting to different profiles.
- Articulate their individual needs to the team and how the team can contribute to their individual development.
- Recognize the value of making decisions as a group rather than individually.
- Position the team in one of the stages of development and envision a future stage for the team, acknowledging the gap between the two.
- Develop and implement a set of actions to bridge the identified gap.

Based on these goals, it was possible to design a customized initiative aimed at enhancing teamwork and communication across all teams of Wealth Analytical Services at Mercer located in Portugal.



## Overview

This experiential learning journey was developed based on the identified objectives. These objectives were derived from focus groups where personas, empathy maps, experience maps, among other exercises, were created using a design thinking methodology.

Considering the objectives, it was determined that a 4-hour teambuilding session would be sufficient. As this initiative aimed to serve as an anchor moment for the teams, it was decided that the session should be conducted in person, allowing for physical interaction between team members and their managers.

The entire Journey was designed to be a experiential learning moment, utilizing active methodologies such as educational games, role plays, icebreakers, case studies, and brainstorming sessions. A pilot session was conducted in January to test the methodology and content, which allowed for refinement of some of the activities.

The teambuilding journey was then disseminated to the teams through email, virtual games, and physical communications in the office, such as at the coffee point. Managers enrolled their teams based on the availability of facilitators.

On average, 2 teambuilding sessions were conducted each month, covering a total of 300 colleagues (67% of the total population; the remaining teams will undergo the teambuilding journey throughout the year 2024).

At the end of the teambuilding session, participants were invited to complete a survey to measure their satisfaction (Level 1 of the Kirkpatrick model). Additionally, teams received their action plans and notes from the various activities and discussions via email.

A survey was developed for participants to complete 1 to 2 months after the teambuilding session, aiming to assess the impact of the journey, particularly in terms of the learning achieved and observable behavior changes (Levels 2 and 3 of the Kirkpatrick model). Feedback from people managers was also collected.

Based on this feedback and the survey results, improvements were identified in areas such as Trust/Psychological Safety (80% of colleagues reported feeling it), Team Purpose and Identity (70% of colleagues now perceive its existence), and



Communication (70% of colleagues experienced improvements). It was also observed that the action plans developed by the team were implemented, which may explain these positive results, as the combination of the teambuilding with the implementation of the actions contributed to the outcome.

A second phase of this teambuilding program is currently being designed for implementation with the teams throughout the year 2024.

## **Design of the Program**

The design of this journey was based on the methodology of Design Thinking, utilizing focus groups to gather information and create Personas, Experience Maps, Empathy Maps, Prioritization Matrices, Problem Statements, and Goals. Preferences for the type of initiative, specifically experiential learning, were identified during the focus groups. The best timing and duration for each team's teambuilding activities were also determined based on pedagogical considerations.

After collecting and analyzing this information, the identified gaps were addressed, and pedagogical objectives were developed. These objectives were carefully aligned with the organization's needs, individual needs, and any potential constraints such as time, resources, and availability.

The next step involved identifying the content to be included in the teambuilding activities. The journey aimed to enhance self-awareness and mutual understanding among team members, train effective communication and adjustment techniques, foster discussions on the key elements of successful teams, evaluate the team's performance against these elements, and instill a recognition of the added value of teamwork compared to individual work. Various established models and authors, such as the Insights model, DISC, Emy Edmonson's research on psychological safety, and Bruce Tuckman's stages of team maturity, were used as references.

The journey then focused on applying active learning methodologies to these contents, ensuring that each team member actively participated in all aspects of the teambuilding activities. Techniques such as role play, case analysis, group work, educational games, and brainstorming were employed.

The initial phase of this learning process, the teambuilding session, lasted approximately 4 hours. This was followed by an implementation phase, during which the facilitation team and respective managers provided support and



guidance for the team's action plan. One to two months after the teambuilding's completion, each team filled out a survey to measure its impact (Level 2 and Level 3 in Kirkpatrick's evaluation model).

Immediately after the teambuilding session, participants were asked to complete a satisfaction survey (Level 1 in Kirkpatrick's evaluation model). They also received a summary of the team's most interesting insights and the corresponding action plan to be implemented.

Each manager determined the most suitable date for the teambuilding session based on their team's availability, taking into account the facilitation team's availability as well. Team members received personalized invitations containing general information about the initiative and specific objectives to be achieved.

Managers also identified the best approach for following up on the team's action plan, with support from the facilitation team.

Mercer considered this teambuilding and its implementation plan as a relevant training opportunity, legally included in the total of 40 mandatory training hours per year that each employee in Portugal must complete.

## **Delivery of the Program**

The teambuilding was conducted in a fully in-person format. As previously mentioned, the initiative served as an anchor moment for the teams, where all members gathered in the office for the teambuilding activities. People managers participated in the teambuilding to gain a deeper understanding of their team members beyond their professional roles.

The implementation phase of the action plan followed the format agreed upon by each team, resulting in variations between in-person, virtual, and hybrid formats, depending on the team.

The teambuilding was co-facilitated by two facilitators, aiming to create greater dynamics and rhythm throughout all activities. This approach also allowed for better support during group work, brainstorming sessions, and other activities.

The journey's facilitators are specialized trainers who are part of our internal trainer pool. To become a member of the pool, all trainers go through a recruitment process, including interviews to assess motivation and expectations, as well as a simulation with a more experienced trainer to evaluate skills and potential





development needs. After the recruitment phase, trainers undergo competency development, including participation in a Train the Trainer program designed by experienced L&D partners. These trainers continue to be supported and developed through initiatives such as virtual pathways, peer learning, lab sessions with external speakers, among others. No trainer facilitates any initiative without undergoing specific Train the Trainer sessions on the content and activities, and without observing and co-facilitating with a more experienced trainer.

The journey began with a approximately 4-hour teambuilding session, followed by an implementation phase of the action plan, with support from the facilitators and the respective team managers.

Active learning methodologies were used during the teambuilding's delivery. Techniques such as role play, case analysis, group work, educational games, and brainstorming were employed to promote active participation and experiential learning among the participants.

Continuous support was provided to the participants throughout the journey. The facilitation team shared relevant insights, session content, and the implementation plan with the participants and managers. They were available to answer questions, provide guidance, and assist in the implementation of the action plan developed by each team.

The importance of learning occurring as a journey rather than just a single moment cannot be overstated. Continuity and follow-up are crucial elements in ensuring that learning is effectively transferred and applied in real-life situations. Stella Collins, an expert in learning transfer, emphasizes the significance of bridging the gap between training and practical application. When learning is approached as a journey, participants have the opportunity to not only acquire knowledge and skills but also to engage in activities that allow them to apply what they have learned in a concrete and meaningful way. This ongoing process of reinforcement and application enhances the transfer of learning, enabling individuals to effectively utilize their newly acquired knowledge and skills in their daily work, contributing to the success of their teams and organization.



## Measurable Benefits

A total of 300 colleagues participated in this journey, and the team used the Kirkpatrick's model, specifically the 4 levels of evaluation, to assess the training effectiveness.

At Level 1, the team measured the engagement level, proactiveness, contribution, and reaction to how well the training was received. They also sought areas for improvement in the teambuilding. Participants were asked questions such as whether they felt the training was worthwhile, if they thought it was successful, and what the strengths and weaknesses of the sessions were. They were also asked about the engagement and relevance of the training activities to their job roles. The general Net Promoter Score (NPS) was 90%.

Feedback collected from this initial survey included comments about specific learnings and positive experiences during the teambuilding:

"I learned 2 ways to denote Feedbacks as 'Constructive Feedback and Motivational Feedback'; Give Feedback in private and appreciation in Public; Be clear and give feedback with facts & figures; Be Empathetic; Active Listening Tools; Action Plan; etc."

"That was the first time I went to the office and going alone was a big challenge because I don't have much balance and I fall a lot. But it was amazing to have known the team I work with. I simply loved the experience!!!"

"Everything was so positive! The teamwork, the knowledge about different personalities and where each of us 'fit,' and the work in team vs individually."

"A really dynamic session, where we feel we could give your opinion without any complex. A good and safe environment, where I shared my opinions without any judgment."

"Getting to know even better some colleagues that I didn't have as much opportunity to meet before and cementing the group bond even more. Also understanding the different types of personalities, which I found very interesting. The overall experience was very enlightening."



Moving on to Level 2, the team measured what colleagues have and haven't learned based on the learning objectives, as well as what they think they would do differently as a result. They also assessed their readiness, confidence, and motivation to implement changes in their work. A survey with specific questions regarding the content was created, which participants had to fill out again once the journey was over. That survey combined questions regarding level 2 and level 3.

At Level 3, the team evaluated participants' changes in behavior by also asking their managers to provide feedback on their performance. The feedback and survey analysis showed that there was learning from this journey, as well as improvements in certain aspects of team members' behaviors. Areas such as Trust/Psychological Safety (80% of colleagues reported feeling it), Team Purpose and Identity (70% of colleagues now perceive its existence), and Communication (70% of colleagues experienced improvements) showed positive improvements. The implementation of action plans developed by the team contributed to these positive results.

Finally, at Level 4, participants were asked to share testimonials a few months after the end of the journey to understand the overall impact on their development and work.

Testimonials highlighted the positive effects of the teambuilding journey, such as better understanding of colleagues, improved communication, and a stronger sense of team purpose:

"I believe this teambuilding helped us to know our colleagues better and how we should deal with them. We also became more aware of the importance of communication and cooperation in our team. I think the teambuilding made us understand more about the team's purpose and the moment that it lives."

"To this day, we still talk about the different tendencies we have. It was a great way to understand each other a bit better. I believe the teambuilding has helped us to identify/raise relevant points in terms of team communication. There's now positive communication in our team."

"Knowing how each of our co-workers would like to be treated made day-to-day communication much easier and faster."



## **Overall**

Overall, the evaluation of the journey demonstrated positive results in terms of participant satisfaction, learning, behavior change, and business impact. The journey approach, combined with the use of the Kirkpatrick's model, allowed for a comprehensive assessment of the journey's effectiveness and its impact on the participants and their work. This journey successfully fostered a positive and collaborative work environment, leading to improved team dynamics and performance.



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