



MetLife Empowers 7,000+ Customer Service Associates with AI-Driven Skills Hub

MetLife

Best Unique or Innovative Learning and Development Program

November 2024



Company Background



MetLife

| Company-at-a-Glance | |
|--|---|
| Headquarters | New York, NY, USA |
| Year Founded | 1868 |
| Revenue | US~\$67 billion (2023) |
| Employees | ~45,000 |
| Global Scale (Regions that you operate in or provide services to) | 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. |
| Customers/Output, etc. (Key customers and services offered) | MetLife, Inc., through its subsidiaries and affiliates (collectively, “MetLife”) is one of the world’s leading financial services companies, providing insurance, annuities, employee benefits and asset management services. |
| Industry | Insurance |



| | |
|---------------------|-----------------|
| Stock Symbol | NYSE: MET |
| Website | www.metlife.com |

Budget and Timeframe

| Budget and Timeframe | |
|--|--|
| Overall budget | (Insert text here) |
| Number of (HR, Learning, Talent) employees involved with the implementation? | Core Team (6) Production Enablement Training Team (17) |
| Number of Operations or Subject Matter Expert employees involved with the implementation? | Subject Matter Experts/Content Developers: <ul style="list-style-type: none"> - MLH Service/Ops (4) - RIS Service/Ops (3) - Group Service/Ops (5) |
| Number of contractors involved with implementation | Not applicable |
| Timeframe to implement | 9 months |
| Start date of the program | June 2023 |

Fit to the Needs

Overview

Like many large corporations, associates across the US-based Service & Operations teams within MetLife Global Customer Service & Operations (GCSO) receive a large volume of communications around opportunities to develop their skills. With time being a precious commodity, it is important for any associate to be able to efficiently use their time to professionally develop. Nothing is more frustrating than wanting to quickly find training content to improve oneself and spending most of that time searching and scouring various communications or platforms to find it. This experience was confirmed by MetLife associates via our yearly associate satisfaction survey.

GCSO associates requested support from the GCSO Training team to locate content related to their business or roles quickly. Specific feedback from GCSO associates centered on time for learning and being able to quickly access training/learning that was quick to consume and relevant to their role. They shared that when time was available in their busy schedules, they often spent time



searching emails or filtering through search results in our Learning Management System (LMS) for the best course to support them in current/future roles. By providing a curated learning experience, associates could efficiently use their professional development time to locate and consume training related to their roles, as opposed to searching through emails, the company's intranet site for learning communications and filtering through search results that could contain 50+ learning options on 1 topic.

The GCSO Training team is a tenured team that with a strong understanding of the Call Center Service and Operations/Claims business. With this strong business and L&D acumen the team built the GCSO Skills Hub. The goal for this effort was to create a site that was a one-stop starting point for GCSO associates to view the latest enterprise and GCSO training opportunities across our lines of business.

Benefits of the GCSO Skills Hub include, but are not limited to:

- Providing a GCSO business-specific learning portal experience to reduce the time it takes to access training for current roles
- Deliver access to curated content based on GCSO associate requests
- Decreased time to search for and access Enterprise and GCSO specific training
- Access to professional skills training that changes daily and is 15 minutes (maximum) to consume
- Consolidated Communications on Enterprise and GCSO training solution releases and content

GCSO Training worked with their business partners in Group Benefits, MetLife Holdings and Retirement Income Solutions (RIS) to identify and provide direct access to thousands of training solutions that support the professional, technical or product training needs from our associates within the US market. Since its launch in June 2023, 7000+ associates (unique visitors) across MetLife have completed 19000+ hours of training using the GCSO Skills Hub as its entry point.

Although focused on the US Market, the GCSO Skills Hub is working with colleagues in other MetLife global markets to share the design and implementation best practices. Through this collaboration, the goal is to have multiple language iterations of the GCSO tailored learning solution.



Design of the Program

As the GCSO Training team was completing the analysis and design phases of the site, our focus was on innovation/uniqueness to make this a tailored learning site for and driven by GCSO associates. We wanted to highlight and share content being created and utilized by GCSO associates within MetLife Holdings, Retirement Income Solutions and Group lines of business. We also wanted to streamline and filter all the training communications that our associates are receiving and consolidate the opportunities into 1 channel.

The GCSO Training team reviewed associate training feedback, met with various levels within GCSO to discuss pain points or opportunities to support time for learning, and utilized input from industry organizations like JD Power to understand employee training trends and best practices.

The GCSO Training team found that the biggest pain points for the organization were:

- Locating and accessing training quickly based on enterprise and business specific training communications and sources
- Identifying job specific training recommendations from peers or industry content providers
- Inability to quickly view and access training opportunities occurring throughout the Enterprise/GTO and business

Through the User and Instructional Design analysis, the uniqueness/innovation of this effort comes from these areas:

- Ability to quickly access content being utilized across GCSO
- Use of an Enterprise AI learning solution, MyLearning - Degreed, to proactively offer training solutions based on associated selected criteria
- GCSO Skills Hub ability to provide a structured and curated learning experience based on Enterprise, GTO and GCSO training solutions

As part of the Design/Development phases, GCSO Training held meetings with business partners and learners to review the design of the learning portal experience. Based on the feedback, we created a user interface based in simple, easy to read navigation to curated content options.

With the support of the MetLife Enterprise L&D team, GCSO Training reviewed the strengths of the Learning Platform using AI to improve the opportunities identified. Utilizing Focus Skills or Degreed Proactive training topic sharing functionality allows an associate to identify and capture within the MyLearning platform, training that is important to the associate.



The GCSO Training team used associate feedback, enterprise training and learning technology expertise and support from GCSO Sr. Leaders to design a program that is unique, while using innovative technologies.

Let's take a moment to review the main sections within the GCSO Skills Hub.

- **Micro-Learning:**
 - With professional skills micro-learning available on the GCSO Skills Hub, associates can learn a new skill in 15 minutes or less
- **News Stand**
 - Provides associates with the latest new, curated training opportunities that are accessible to GCSO associates
- **Professional Skills:**
 - Provides enterprise and HR specific training content in an easy-to-use interface based on industry professional skills
- **Technical Skills:**
 - Allows for role specific training to be curated and accessed by associates based on the line of business or group that it is designed for
 - Allows associates in one department to view and consume training for roles outside of their current department; this sets up a potential talent pool for roles across GCSO and MetLife
- **Focus Skills:**
 - Provides GCSO associates with the skills to use and prompt MetLife Learning technology to proactively serve associates with training based on skills the associate marks as important to them
 - Results from the MetLife Learning technology are supported using AI capabilities within the learning platform, which innovates the experience with the latest technology
- **Training Calendar:**
 - Opportunities to view learning opportunities sponsored by the Enterprise, GTO and GCSO in a monthly calendar view
- **Quick Links/ Suggested Resources/Contact Us:**
 - Various Enterprise, GTO and GCSO training related options and resources
 - Provides GCSO associates with a communications channel to request new content to be added to the Skills Hub or training options to be added to the calendar



Delivery of the Program

As is the case with other implementations, the largest challenge is initial adoption. Multiple priorities, commitment to our customers and a previously disorganized training experience made the delivery and communication plan critical for the successful launch of the GCSO Skills Hub. In the Call Center and Operations arena, associate time is extremely valuable with multiple activities pulling for it.

- Early success of the program is attributed to GCSO Sr. Leader support and a top-down communication plan that highlighted Sr. Leadership's support. Within the Communication plan, the following messages were highlighted:
 - Commitment to actioning associate feedback
 - Content requested by GCSO associates for GCSO associates
 - First stop for a curated GCSO experience

The launch email focused on the benefits and key drivers (associate feedback) of the site, which allowed associates to prioritize usage of the Skills Hub as a professional development opportunity during their free time. The GCSO Training team also marketed the use of the site by attending several Leader meetings and team huddles to review the GCSO Skills Hub along with its benefits.

Every GCSO associate is provided access to 95% of the learning contained within the GCSO Skills Hub. The only section that not everyone has access to is designed for People Leaders only. People Leaders have access to a training section provided by MetLife Human Resources Business Partners (HRBPs) with secured HR specific training.

Measurable Benefits

To ensure that the GCSO Skills Hub provided value to GCSO associates, the GCSO Training team captured the following metrics:

- Content consumption (Total Hours, Course Completions)
- Unique visits to the GCSO Skills Hub
- Monthly consumption trends
- Top 5 Professional Training
- Top 5 Technical Training
- Top 5 Other Training Category
- Line of Business Completion Reports



These metrics were prioritized for reporting because they capture data around training content access & consumption, target audience utilization, and information focusing on content/training that GCSO peers are searching for and consuming. The content/training consumption trends are then shared with leadership and associates. All these metrics were considered important in determining the GCSO Skills Hub solution's effectiveness.

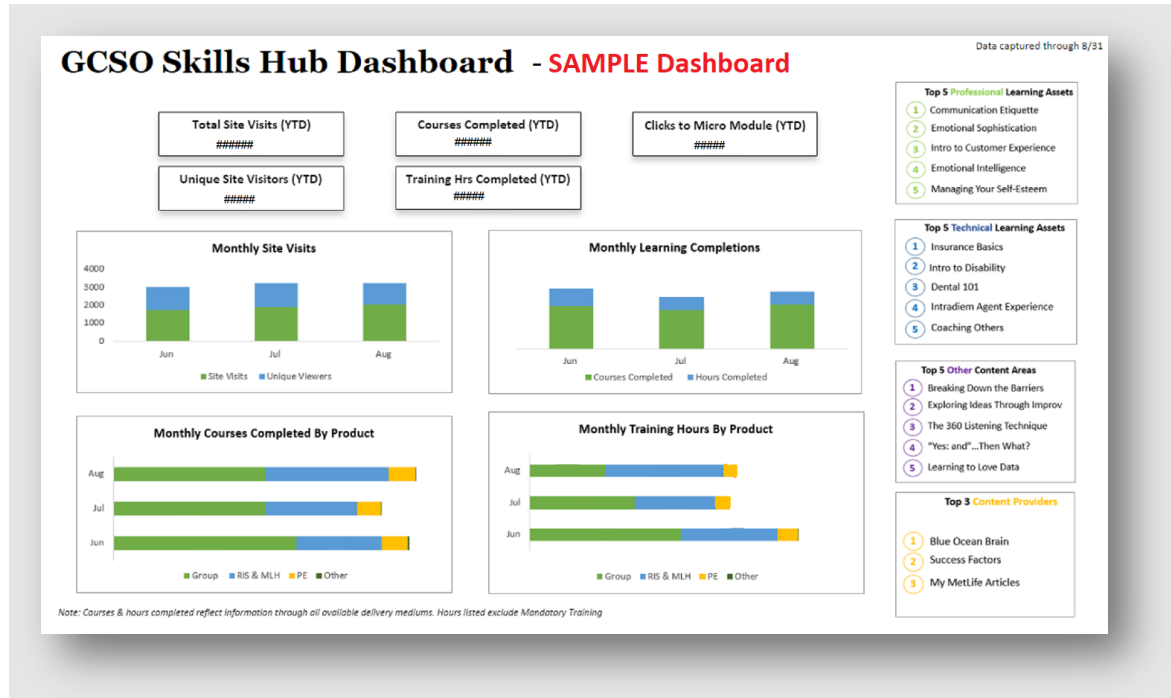
Since it's deployment in June 2023, there have been 7000+ unique visitors to the site with 19,000+ hours of training consumed by US GCSO associates. Associates have accessed 56,000 training courses and assets accessible via the Skills Hub.

There is a training solution housed on the GCSO Skills Hub that provides GCSO associates with a new, professional or technical training topic, daily, that can be consumed using 5-15 minutes of the associates' time. Since the launch of the GCSO Skills Hub, this daily micro module has been accessed over 47,000+ times, providing associates with a curated content experience aligned to important job-related skills.

Below is an example of a dashboard that contains the measurable metrics and benefits aligned with the GCSO Skills Hub.



GCSO Skill Hub Dashboard



Overall

With the implementation of the GCSO Skills Hub, GCSO associates are using the site to begin their learning journey as evidenced by the training consumption data provided. Associates appreciate that the GCSO Skills Hub consolidates and centralizes training opportunities from across the Enterprise.

Lessons learned around Content Governance & Maintenance became quickly evident. One of the goals of the Skills Hub is to keep content fresh with updates happening often. The primary generator of new content offerings on the Skills Hub is the Micro Module of the day. Topics are updated daily via an integration with Blue Ocean Brain, the vendor who powers the Micro Module of the day component. We also update the Learning Plans and Pathways with new content that is developed by internal and external content developers monthly, at a minimum. With access to all of the various forms of training content, implementing a review cycle of all of the hundreds of content links made accessible via the GCSO Skills Hub. The GCSO PE team implemented a Content Review Cycle where the team reviews each link on the GCSO Skills Hub to ensure they are working and directing associates to the correct content. We also review all content links in the MyLearning Plan and Pathways that are accessible from the GCSO Skills Hub. The main benefit for our GCSO associates is trusting that the site is updated with



new content often and that if training content is accessible via the Skills Hub, the links to the training will work and take them to the training. A formal yearly content audit process has been implemented on the site.

The future for the GCSO Skills Hub is exciting over the next few years. Now that content is consolidated and access made easier, GCSO business partners and associates are asking for Career Path & Training alignment support.

Within each line of business, a career path is outlined for entry level team members to grow professionally within the organization. The next phase of GCSO Skills Hub support will focus on aligning content and competencies to the career path to provide a roadmap. The roadmap will guide associates to training that will provide them with skills to improve their current role, while preparing them with future role skills. Collaborations with HR, business associates and leadership will be critical to the success of this next phase.

- Human Resources will contribute to the competency alignment with each role.
- Business associates will share their requirements around the training experiences that work best for them.
- Business leadership will share their vision on future skills needed for roles within their respective organizations. We can then align the competencies and training to support their future skills

The GCSO Training team has team members who have created this experience for other business groups. The team's experience will allow for an efficient implementation of the future feature of the GCSO Skills Hub. Having worked with HR, Business associates and business leaders to accomplish a similar result.

In closing, GCSO associates shared their experiences and frustrations with locating, accessing and consuming training to professionally develop because of the volume and multiple channels of communication. The GCSO Training team actioned that feedback by creating the GCSO Skills Hub. The GCSO Skills Hub is a first and one-stop location for GCSO associates to access training opportunities across the Enterprise, Global Technology & Operations and GCSO businesses. GCSO associates are able to quickly identify, access and consume content via the following Skills Hub sections:

- Micro-Learning:
 - With professional skills micro-learning available on the GCSO Skills Hub, associates are able to learn a new skill in 15 minutes or less
- Training Calendar:



- The opportunity to view learning opportunities sponsored by the Enterprise, GTO and GCSO in a monthly calendar view
- Professional Skills
 - This section provides enterprise and HR specific training content in an easy-to-use interface based on industry professional skills
- Technical Skills
 - This section allows for role specific training to be curated and accessed by associates based on the line of business or group that it is designed for
 - This section allows associates in one department to view and consume training for roles outside of their current department; this sets up a potential talent pool for roles across GCSO and MetLife
- Focus Skills
 - This section provides GCSO associates with the skills to use and prompt MetLife Learning technology to proactively serve associates with training based on skills the associate marks as important to them
 - Results from the MetLife Learning technology are supported using Artificial Intelligence (AI) capabilities within the learning platform, which innovates the experience with the latest technology

Your consideration of the GCSO Skills Hub for your prestigious award is greatly appreciated.



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