Industry: Insurance

Insurance Powerhouse Builds Change Capability to Transform the Business

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These are significantly different times, and changing as an organization is not just about competitive advantage anymore. It's about changing to survive and thrive as an organization, and our partnership with Prosci is helping us achieve this.

Senior Manager, Enterprise Change Management

Background

This Fortune 500 provider of supplemental insurance to more than 50 million people worldwide enables individuals to focus on recovery rather than financial stress. Earning impressive accolades in recent years for its business ethics, civic-mindedness, workplace culture and more, the company has more than 4,000 employees and operates mainly in the U.S.

Business Challenge

- Overcome change management siloes
- Address change saturation
- Scale change management to meet growing demand for the capability

Solution Highlights

- Establish enterprise change management strategy and structure
- Develop standard change management processes
- Partner with Prosci to grow change management competency

Results Highlights

- Increased organizational change maturity level from 2.41 to 3.56 out of 5.0, well surpassing goal
- Grew change capabilities across the organization, achieving positive results on projects
- Achieved high adoption on new agent enrollment platform
- At onset of pandemic, successfully moved 95% of the workforce to working remotely in five days, plus achieved 97% approval rating for ease of transition

Challenge

Seeking better results on change initiatives

Previously, change management capabilities lived in pockets across the organization and focused mainly on communicating about the changes happening. In addition, the team with the greatest responsibility for managing change was shrinking while the number of change projects grew. The company needed a better, more scalable approach to change management to ensure enterprise agility and resiliency to support its shifting, growing business. "Our leadership team recognized that we needed to centralize our change management function and develop consistent practices based on a standard methodology," says the senior manager of enterprise change management (ECM).

Solution

Partnering with Prosci to become a more agile, change-ready organization

The company embarked on a change management journey that started with establishing a centralized change management function and strategy. The organization formally launched a "Building Change Capability" initiative, forging a strong partnership with Prosci to support them on their mission.

Establishing change management strategy and structure

Their strategy included launching an Office of Change Management (OCM), building a change management team, and establishing a Change Advisory Council and community of practice. An onsite Prosci Enterprise Change Management Workshop attended by a cross-functional group from departments such as OCM, IT, and Learning and Development helped align the Prosci

Methodology with the company's strategic business goals. To measure overall progress in developing change capability, the OCM uses the Prosci Change Management Maturity Model Audit. An initial audit revealed a baseline change maturity score of 2.41 out of 5.0, with target scores established for each of the next several years.

Standardizing change management processes

As the demand for the core change management team grew, the company made a strategic decision to extend those capabilities to others across the organization. They invited Prosci to facilitate several onsite Change Management Certification Programs, certifying dozens of practitioners. As more individuals became proficient with the Prosci Methodology, the change management team standardized processes to drive efficiencies and project results, and to set practitioners up for success.

Prosci's Change Portfolio Workshop and Integrating Agile and Change Management Workshop helped the OCM effectively manage its portfolio of projects. The company leverages key Prosci tools for assessing change impact and needed project resources, such as the Prosci Risk Assessment and Impact Index.

Growing change management competency

Prosci facilitated additional Change Management Certification Programs onsite, and to date this company has more than 100 Prosci Certified Change Practitioners. To further develop practitioners, the growing community of practice meets monthly and takes on the change management topics that matter most. Numerous Prosci Change Management Sponsor Briefings and an advanced training program helped prepare sponsors for their change management roles and advance the capabilities of practitioners.

To extend capabilities further and be able to deliver Prosci role-based change management training internally on their own, 10 individuals attended the Prosci Train-the-Trainer Program. These change leaders can deliver Prosci programs designed for specific roles, including front-line employees, people managers, project managers and their teams, sponsors and change practitioners.

The company also secured a Prosci ECM License. Says the senior manager of ECM,

> **❝ The Prosci License gives us the flexibility to print the materials for our role-based programs internally at a significant cost savings, and to add our branding for greater impact. ❞**

Results

Achieving digital and cultural transformation through change management

Building change capability is ultimately about developing the change management strategies, skills and resources to do change better as an organization. By partnering with Prosci and leveraging the Prosci Methodology, the company is focusing on the people side of change—driving project success and helping to transform the business.

Change management at the organizational level

The company has come a long way in a short period of time to manage change more effectively. "Prosci has pulled all of the change management pieces together for us to successfully drive change," says the senior manager of ECM. By leveraging Prosci and taking steps to build change capability, the company improved it's organizational change maturity level from 2.41 to 3.56 (out of 5), well surpassing its goal for the year and becoming more change-ready as an organization.

Change management at the project level

With a $325M project portfolio and the pressure to achieve high project ROI, the OCM promotes adoption and usage by applying Prosci change management to projects throughout their lifecycles, and increasingly enabling others to do the same. The senior manager of ECM credits the research-based approach of the Prosci Methodology to its effectiveness. She says, "The Prosci Methodology is backed by data and over 20 years of research, making it a true best-practices approach. And all of the Prosci resources, such as webinars, videos and the portal, contribute to our continued growth as a team."

Building change capability equips change leaders, practitioners and sponsors with the tools and skills they need to apply the Prosci Methodology to important projects across the organization, particularly in the areas of digital technology and culture. A few examples follow.

- **Agent enrollment platform**
  To better serve the needs of its thousands of agents, the company developed a more flexible enrollment platform with important capabilities. It was critical for the OCM to manage this change well and not disrupt the sales cycle and agent/client interactions. Results so far have been impressive. In the six weeks since launching the new platform, agents have written 146,000 applications. In addition, targeting a score of 50% for ease of use, they so far have reached 58%.

- **Remote workforce**
  Moving to a remote workforce in the spring of 2020 due to COVID-19 was a big change for companies, but for this organization, it was nothing less than radical, since employees are typically expected to work onsite. The combined efforts of the change management and project management teams, along with an active, highly visible executive sponsor, contributed to the success of the initiative. "We moved 95% of our workforce home in five days, and surveys show that 97% of employees feel the company was quick to accommodate the change to telework," says the senior manager of ECM.

- **ISO quality management system**
  The company is adopting the principles of the International Organization for Standardization, or ISO, across the organization. A project team is deploying a central quality management system (QMS), based on the ISO 9001 standard, department by department with the support of a Prosci Certified Change Practitioner from the OCM. So far, three business units have successfully adopted the QMS system, five are in progress, and four more are planned for the coming year. The Building Change Capability initiative is making its mark. "We can eventually remove the change practitioner from the process because we've extended the change capabilities to the project team and empowered them to carry the change plan forward," says the senior manager.

Looking Ahead

With a functional OCM and growing force of change practitioners and change leaders, the OCM will continue to focus on transforming the team from executing change management to enabling others to manage change. The group is also providing oversight to ensure that individuals are applying Prosci change management and doing it effectively, especially important with what's at stake. "These are significantly different times, and changing as an organization is not just about competitive advantage anymore," says the senior manager of ECM. "It's about changing to survive and thrive as an organization, and our partnership with Prosci is helping us achieve this."

Have questions? Contact Prosci to learn more.

Contact us