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Cristina Moroyoqui León, Employee Experience Leader, SURA

## Background

SURA Asset Management is a Latin American subsidiary of Grupo SURA, a financial services leader with more than 70 years of industry experience. With operations in Mexico, Peru, Chile, Colombia, Uruguay and El Salvador, SURA specializes in pensions, savings and investments. The company of 2,800 employees protects the dreams and well-being of 19 million Latin Americans through managing assets worth \$131 billion (2.6 trillion pesos).

## Challenge

### Preparing for Numerous Large, Complex Organizational Changes

A few years after arriving in Mexico in 2011, SURA experienced significant regulatory changes. In addition, the company was taking on several large and disruptive projects:

- Digitalization in the pensions department
- Innovation initiative
- Product sales strategy revamp
- Flex Office Project

By 2014, leadership had identified change management as critical to the success of these projects and a vital component of future growth and stability.

## Highlights

### Business Challenge

- Become a flexible and modern organization that can quickly and effectively enact change
- Build a change management capability
- Integrate change management and project management

### Solution

- Empower key employees with Prosci change management certifications
- Adopt the Prosci methodology
- Leverage Advisory Services, Change Management Program for Managers, and Change Management Sponsor Briefing
- Facilitate role-based training for impacted groups

### Results

- Expanded client base by 2.3 million
- Reduced client turnover by 44% over a 3-year period
- Increased the number of sales managers selling multiple products by 133%
- Boosted voluntary pension enrollments by 22%
- Saved \$706,000 (14 million pesos) by enhancing customer loyalty and retention
- Drove more than \$240,000 (4.5 million pesos) in cost savings by transitioning 300 employees from a fixed office to a flex office

In 2015, SURA partnered with Faculta—a Prosci Global Partner headquartered in Mexico City—to embark on a journey to change management capability. “Faculta understood the internal and external changes happening at SURA and in our industry,” says Cristina Moroyoqui León, employee experience leader at SURA. Faculta also has a deep knowledge of change management, including Prosci’s change management methodologies, and could guide SURA and its leaders through their changes. “We faced several large changes at once, which was the perfect time to adopt Prosci’s approach to change management,” adds Moroyoqui.

## Solution

### Elevating Organizational Change Capability

SURA leadership knew they needed more than change management tools. They engaged Faculta to help create a solid change management strategy focused on integrating change management and project management, a practice deeply embedded into Prosci’s approach to change management. “We always carefully consider how our projects will impact our employees,” says Moroyoqui. “Integrating change management and project management will help us manage the people side of our changes as effectively as the technical side, which is central to Prosci’s philosophy and ours.”

### Advisory Services to Integrate Change Management and Project Management

The Faculta Advisory Services included integration workshops with several leaders, including the head of the Project Management Office. They identified top-priority projects and assigned to each project a sponsor, project manager and change manager—roles that later received specialized change management training.

### Role-Based Training

After establishing a clear change management strategy and identifying several priority projects, SURA initiated




numerous role-based training programs. The company began with a Change Management Sponsor Briefing for key project leaders, including the vice president of human resources, the vice president of sales, and the CEO.

With the executives on board and aware of their roles in change management, the Faculta team facilitated an onsite Prosci Change Management Certification Program. SURA identified the HR business partners’ role to participate in the Certification Program as a natural evolution of their role to support the people-side transition of the top-priority projects. They opened the training to directors and managers. Several others attended regional Prosci Certification Programs in Mexico City and Monterrey. Since forging the relationship with Faculta and moving change management to HR, SURA has certified 35 change management practitioners.

Finally, SURA instituted an ongoing mentoring program where the new team of Prosci Change Management Practitioners met regularly with a Faculta coach. This mentoring program is still in place today and helps change practitioners overcome any obstacles they encounter when applying change management in the field, plus reinforces change management best practices.

### Sponsorship

Sponsors play a key role in helping employees successfully adapt to organizational changes. SURA’s dedicated sponsors were instrumental in the success of its change management initiatives by following Prosci’s ABCs of sponsorship:

-  Actively and visibly participating throughout the project
-  Building a coalition of sponsorship
-  Communicating directly with employees

The company’s innovation and product sales projects emphasize the power of a strong sponsor.

## ***Innovation Initiative***

SURA sponsors implemented a strategy in the company's innovation initiative for building *awareness* and *desire*—the first two steps in the Prosci ADKAR® Model. SURA conducted several executive sessions and workshops about what innovation is and why leaders should want to participate. The CEO and vice president of HR led the workshops. "Our sponsors were exceptional and generated broad interest and acceptance for our innovation initiative," says Moroyoqui. By the end of the six sessions, they had 300 collaborators engaging with the initiative.

## ***Sales and Product Revamp***

One of the most difficult changes SURA embarked on was transitioning from the existing sales approach of selling one product to selling multiple products to clients. Part of this revamp, an initiative to raise enrollment in voluntary pensions, was an important strategy for SURA and the future of its pension holders. "Many Latin Americans do not have the security of a government pension to take care of them as they age," says Moroyoqui. "By purchasing voluntary pensions, these citizens protect themselves and can retire with dignity."

However, resistance was prevalent across the sales team. SURA sales managers had strong feelings and values opposed to selling clients more than one product or even certain products. Victor Romero, managing partner at Faculta, notes, "A sales manager said he couldn't sell a client insurance because it would make the client too fearful about the future."

Overcoming these deeply held objections required focused change management and resistance management work backed by a dedicated, invested sponsor. The vice president of sales candidly presented her own ADKAR Model journey to 350 sales managers. This compelling presentation, accompanied by strong Communications, Training and Resistance Management Plans recommended in the second phase of the Prosci

3-Phase Process, prompted the majority of managers to make the transition from selling one product to four products.

## **Integrating Change Management and Project Management in Top Projects**

SURA's Flex Office and digitalization projects demonstrate the value of integrating change management and project management.

### ***Flex Office Project***

With a goal of creating a more flexible and cost-effective organization, SURA invited 300 employees to move from a fixed office space to a Flex Office Program, which enabled working remotely. This project was complicated by a shifting work environment and the cultural and technological changes it required. Says Moroyoqui,

***“ We expected some resistance because our Flex Office Program offers a very different way of our employees working day to day. Fortunately, resistance management is built into the Prosci methodology. ”***

Microsoft Office 365, the technical solution to enable this change, allowed employees easy access to all work materials, whether working onsite or remotely. Yet employees had to adapt to a new way of working and collaborating, regardless of the advantages of flex days and unified communications. To support employees throughout this change, manage resistance, and help ensure project success, SURA implemented Prosci's five recommended change management plans.

### ***Digitalization Initiative***

In the Pensions Department, a regulatory change required 200 staff members to move from working with paper to working digitally. SURA evolved its

digital solutions to capture better customer information. By incorporating the five change management plans into the project plan, educating sponsors, and communicating regularly with employees, SURA encountered little resistance during this project and implemented the change from paper to digital faster than expected.

## Results

### Benefiting From a Modern Approach to Change

These critical projects—which all included a structured approach to change management—helped SURA become a more flexible and modern organization with increased client satisfaction and customer retention, a more diversified product portfolio, and greater income opportunities for the sales team.

### Increased Employee Innovation and Digitalization

By implementing Prosci change management methodologies, SURA's front-line staff quickly gained proficiency on tablets, which offered important benefits to the company. "Using Prosci's approach to managing change, SURA met its regulatory requirements related to digitalization six months ahead of the competition," says Romero. Targeted change management work also resulted in a 60% increase in employee embodiment of SURA's four pillars of adaptability, mission, participation and consistency.

### More Satisfied Clients

Positive changes in company culture and sales practices increased SURA's client base, raising the number of clients in Mexico from 5.1 million in 2011 to 7.6 million in 2018. "The impact our changes have on our clients is just as important as how they impact our employees," says Moroyoqui. "Customer experience is a top priority." SURA's Net Promoter Score—which gauges overall customer satisfaction—increased from 39 in 2015 to 56 in 2018. These numbers directly correlate with the reduction in client turnover, which dropped from 7.07% in 2014 to 3.96% in 2017.

"By effectively managing the changes to our corporate culture and sales practices, we boosted customer loyalty and retention," says Moroyoqui. "These improvements alone saved SURA 14 million pesos."

### Diversified Product Portfolio and New Income Streams

By incorporating Prosci change management practices and especially the recommended Communications Plan and Sponsor Roadmap, SURA realized benefits to clients, employees and profits. Enrollment in voluntary pensions increased from 14% to 18%, despite the initial strong resistance from sales managers. Similarly, 77% of sales managers sold more than one product, up from 33% prior to these changes. Even better, 48% of sales managers sold four products to repeat customers, a first for the team.



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*Cristina Moroyoqui León, Employee Experience Leader, SURA*



## Happier, More Productive Employees

Transitioning 300 employees from a fixed office to a flex office provided more than \$240,000 (4.5 million pesos) in cost savings and additional efficiency benefits to SURA. In this cultural transformation, employees gained more uninterrupted work time and flexibility, while SURA saved on office space and resources.

## Elevating the Role of Change Management

With the success of these and other projects, SURA is formalizing change management's role by creating a Change Management Office, which Moroyoqui leads. "The CMO will work closely with leadership and the Project Management Office to immerse the Prosci change management methodology into all functions and decision-making," says Moroyoqui. "By doing so, we can better support employees through change while improving project outcomes." Change management is now present in all of the top-priority projects of 2019, including strategic initiatives like the Labor Reform Project.



Have Questions?

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