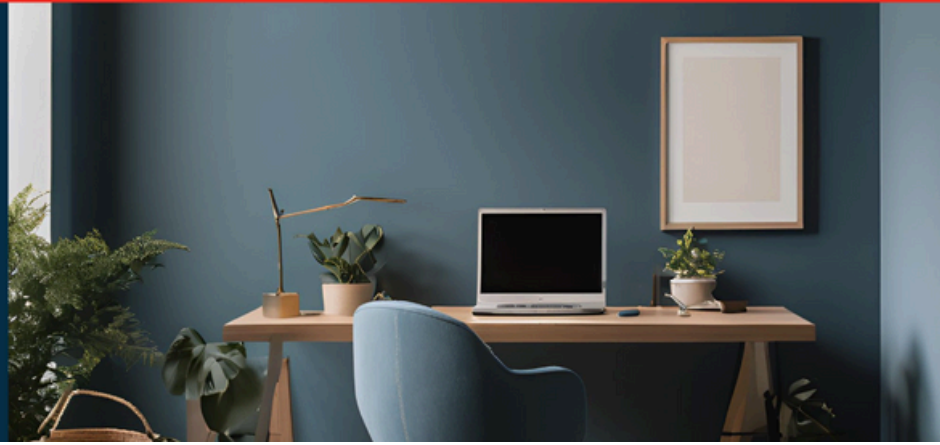


Empowering
People. Elevating
Business.

HR HUMARESO



F100 INSURANCE & FINANCIAL SERVICES ORG DRIVES LASTING BEHAVIOR CHANGE WITH HUMARESO LEAD

A major US-based Insurance company approached Humareso seeking a transformative solution to strengthen leader behaviors, reinforce competencies, and enhance self-awareness among its leadership. Using Lead, Humareso's leadership assessment platform, a pilot was launched within a matter of weeks to start measuring a cohort of the insurer's leaders' behaviors.

From its initial implementation to its integration into Employee Resource Groups (ERGs) and targeted initiatives, Lead is proving to be a catalyst for positive organizational change. This case study demonstrates a real-world example of collaboration, growth, and empowerment as the organization harnesses the power of Lead to deliver a new standard of excellence in leadership development for its Talent Management organization.

*"This is the most exciting 360
platform I've ever worked with in my
professional life"*

-DIRECTOR OF ENTERPRISE DIGITAL LEARNING

A TRUE TALENT MANAGEMENT PROBLEM

As a well-established leader in the insurance industry, the Talent Management team at the insurer understands the criticality of giving leaders timely and effective feedback. However, previous attempts to launch a new 360 assessment had proven to be unsuccessful. As a result, feedback programs had been put on hold to focus on other Learning and Development initiatives, and organizational skepticism had taken root, questioning the viability of feedback-oriented development programs.

The Talent Management team remained convinced that they were not getting the outcomes they wanted without a proper assessment to increase leader self-awareness and feedback, but they would need to overcome this skepticism, all while working within the boundaries of a tightened operating budget. Additionally, their lack of success with programs containing measurement components had also created the problem of a gap in their HR data, making it difficult to understand the impact of their programs, as well as to have visibility into the behaviors of their leaders.



OBJECTIVE

Develop Leadership Behaviors



CHALLENGES

Low Adoption, High Cost



SOLUTIONS

Humareso's 360 Assessment for Leaders

SOLUTION DESIGN

The organization partnered with Humareso to roll out a pilot of Lead (Humareso's 360 assessment) to 200 leaders in 4 unique cohorts. The Leadership Development team's goal was to develop their leader competencies clustered under Emotional Intelligence to strengthen the EQ of leaders within ESGs and a Women in Leadership initiative.

With the partnership of their Humareso consultant, the organization outlined its goals for the program, including measuring the leaders' performance against the behaviors tied to their Emotional Intelligence development programs and collecting longitudinal data to track individual leader performance and program performance over time. Humareso's consulting team worked closely with the Leadership Development team to break down their competencies into smaller, observable behaviors. These behaviors were then measured weekly by feedback providers using simple swipe technology. Using this microsampling methodology, Lead collected hundreds of data points to model into custom dashboards demonstrating impact for the client's talent management team.

The talent management team also partnered with Humareso to develop custom micro-courses to embed into the leader dashboard to facilitate self-led leader learning. Humareso mapped these micro-courses to specific behaviors within the participants' dashboards, suggesting the courses to leaders who may need to improve their behavior scores.

Humareso's modern software tools allowed the program to easily be scaled out to the organization's user bases and minimized user training and consulting overhead. This allowed Humareso to offer a price point on a per-leader basis that was significantly lower than the classic costs of consultants and traditional 360s.

IMPLEMENTATION

As previous assessment programs had stagnated, participation and adoption were a concern. Humareso's consulting team worked glove-in-hand with the client to develop a rollout strategy that would ensure high adoption and ongoing participation of both the leader and feedback providers.

This strategy included:

- Development of a dedicated microsite for participants to swipe through and familiarize themselves with Humareso. Visits to this training site paced the number of participants in the program, signaling interest and engagement with the program.
- Personalized training content to appeal to their participants in the organization, such as short videos, live training sessions, and micro-courses.
- Announcement emails and other training materials to help familiarize participants and feedback providers ahead of the launch of the program.

Rollout was time-sensitive, and the program was able to launch in under one month. Humareso's consulting team collaborated seamlessly with the client's team, ensuring the program's immediate success. This hands-on approach facilitated a smooth launch and enthusiastic participation.



INTEGRATION

Integrated their HRIS and SSO to ensure a seamless experience and full access.



PLANNING

Developed a project plan for stakeholder alignment and a smooth pilot launch.



COMMUNICATION

Rolled out a full communication and training strategy to ensure adoption.

METHODOLOGY

Feedback is the most fundamental and effective way for a leader to learn and develop the interpersonal skills that make them effective in their roles and help them create an environment that gets the highest performance out of their teams.

The problem with feedback is that objective feedback is difficult to collect. The two main problems with getting quality feedback are: 1) users who would observe the leader the most frequently don't possess the necessary communication skills to articulate the objective, developmental elements of high quality performance feedback and 2) feedback providers are often unwilling to commit the necessary time and effort to provide high quality feedback.

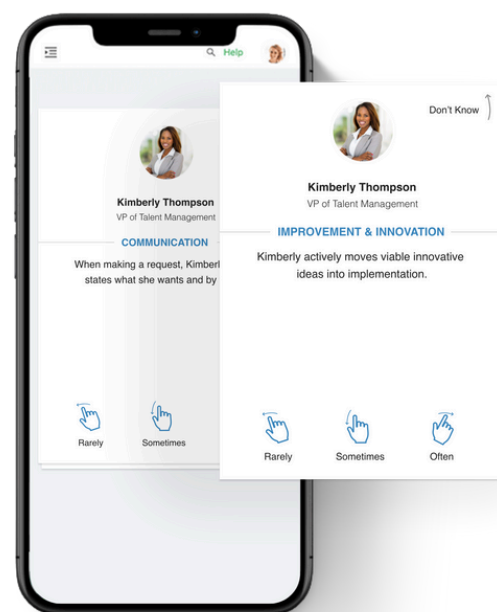
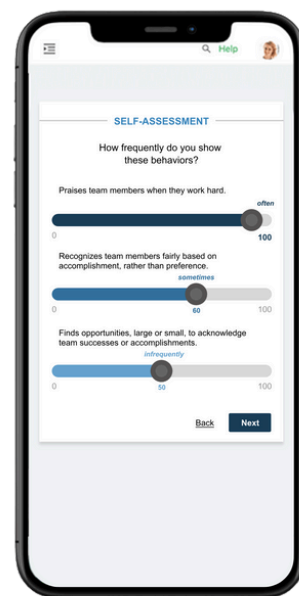
Humareso's Lead platform solves these two problems with exceptional elegance.

Humareso's feedback platform focuses on observed behaviors. Humareso ships with a comprehensive library of behaviors that are clustered into competencies or Habits as they're called in Humareso. These behaviors can also be customized based on existing competency models, strategic priorities, or the specific role of the feedback recipient. In the case of leaders, this may be by level or seniority. For example, first-time managers and executives typically have very different leadership challenges and will rely on a separate set of skills to be successful. There may be some crossover, such as communication skills, but competencies related more to strategy and inter-organizational connectivity may be more useful for executives while budding managers need to develop fundamentals related to delegating work and supporting their individual contributors.

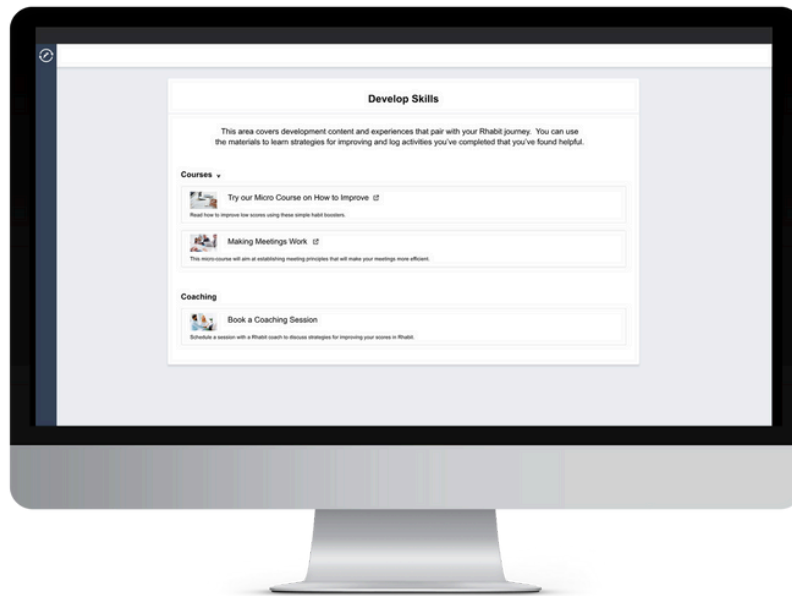
Humareso supports these variations and needs for customization, and the organizational psychologists in our organization have the capability of consulting organizations of any size and complexity in selecting or designing these clusters of behaviors for their leadership development programs utilizing Humareso's platform.

OVERVIEW OF THE LEADERSHIP DEVELOPMENT EXPERIENCE IN HUMARESO LEAD

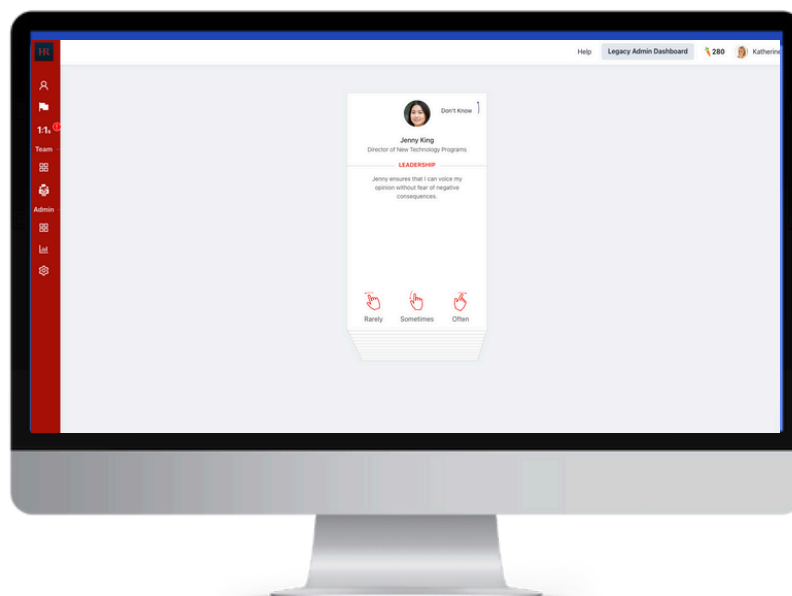
1. User is created in Humareso and completes the onboarding process, including a self assessment of where they believe their strengths and weaknesses are related to the collection of behaviors they'll be focusing on.
2. Once a week Humareso prompts and collects feedback from the leader's feedback providers. Users can provide feedback via any device with an internet browser, including laptops, phones, tablets, and kiosks.
3. Initially, Humareso collects a significant burst of feedback for the leader and shows them their current scores in these behaviors compared to their self-assessment.



4. Humareso supports the inclusion of different types of optional leadership interventions based on the organization's needs. Depending on your needs and the design of the experience, leaders may next experience an intervention such as coaching, a facilitated course, completion of a digital learning exercise, or some other intervention desired by the learning and development organization.



5. Humareso continues to measure for the length of the development program, a configurable length, but typically somewhere between 12 to 24 weeks.



6. At the end of the program the leader is provided with a full summary of their experience, a rich report highlighting their journey and the evolution of their scores and how they have changed over time, along with a log of the different experiences they utilized.



7. Data from the different steps along this process feed a robust set of reporting, dashboarding, and visualization options available to the talent management organization for further analysis and to assist with program accountability and success.

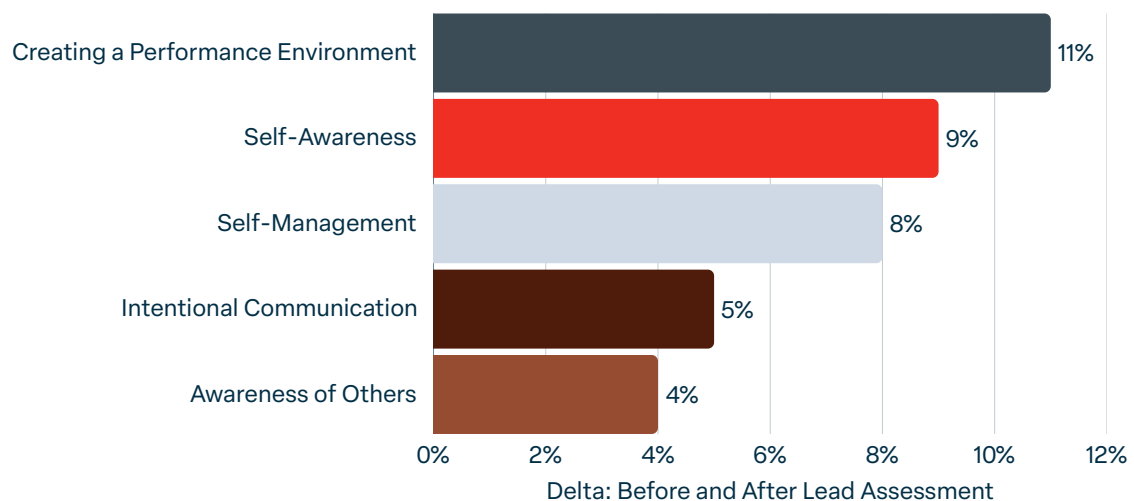


OUTCOMES

The Director of Digital Learning at the client organization hails Lead as the "most exciting 360 platform" they have worked with in their professional career, underscoring the platform's impact on leadership development.

Within a remarkably brief period, the pilot has surpassed expectations, engaging over 200 leaders in the insightful Lead assessment process. As a testament to its efficacy, the program is now poised to expand its influence throughout the organization, shaping a new paradigm for leadership development at the insurer. Sustained participation exceeds 95%, garnering the confidence of the customer's Leadership Development team to share Lead within other segments of the organization and plan beyond the pilot phase.

Average Leader Competency Improvement with Humareso Lead



The value provided to the Insurer's leaders with Humareso Lead includes:

1. **Onboarding and Self-Assessment:** Leaders went through an onboarding process, including a self-assessment of strengths and weaknesses related to targeted behaviors.
2. **Behavioral Insights and Interventions:** Initial feedback highlights strengths and improvement opportunities. Humareso created optional leadership interventions, such as coaching or digital learning exercises, based on need.
3. **Leader Updates and Access to Resources:** Leaders receive weekly updates on their scores, along with suggestions for improvement. Access to supporting materials and integration with the client's Learning Management System (LMS) ensures a comprehensive learning experience.
4. **Comprehensive Program Impact Summary:** At the program's conclusion, leaders receive a detailed summary of their journey, including the evolution of their scores and utilized experiences.

In conclusion, this case study exemplifies the shared success between the well-respected insurance and financial services company and Humareso, showcasing how Lead emerges as a catalyst for transformative leadership. As Lead's influence continues to grow through the organization, the client stands poised for a future defined by empowered leaders and sustained success.