



EXECUTIVE SUMMARY

The Council's Human Resources Working Group met during the Legislative & Working Groups Summit February 5–6, 2018, at The Mandarin Oriental Hotel in Washington, DC. The Council's Elizabeth McDaid and Julia Ruiz staffed the meeting. The first day consisted of a joint interactive working session between the Marketing & Communications Working Group and the HR Working Group. The session focused on the expertise of Marketing & HR to leverage employer brand in recruiting initiatives. The second day, the group participated in an open forum discussion on both successes and struggles currently at hand inside of our member brokerage firms.

PARTICIPANTS

Click [here](#) for the roster.

LEVERAGING THE EXPERTISE OF MARKETING & HR

Presenter: Lars Schmidt, Founder, Amplify (a boutique HR search and consulting firm)

Creating a stronger workforce for tomorrow relies heavily on the evolution of and the marriage between Marketing and HR, according to Schmidt. This marriage includes the role HR and Marketing play together in branding and recruiting strategies, retention strategies, and being able to identify and work through challenges like technology gaps, mass retirements, limited resources and telling a better “story” about our industry.

Key stats:

- 3 hires for every 1: Studies show that three young producers need to be hired for every currently employed producer.
- By 2020, millennials will comprise 50 percent of the workforce; by 2025, they will comprise 75 percent
 - Only four percent of these millennials has any interest in insurance as a career

Highlighting trends, tools channels and drivers of change in today's recruitment strategies.

Social Channels for Employer Branding

- Big 3:
 - Twitter (decreasing): not used to recruit
 - LinkedIn (increasing): use for manager relationships/professional content

- Facebook (increasing): house for content (1 out of 8 people on the planet use FB; 79 percent of all internet users)
- Facebook – videos
 - Facebook Live: viewers can comment
 - 10x more response on live videos
 - Organic videos have a much higher response
 - Can use the work histories feature for recruitment
 - Targeted ads (micro-targeting and using bots)
- Instagram – use depending on audience
 - Visual, stories, events: recruit
 - Show the space, where are they going to work
- Snapchat –very different channel; best if executed by an in-house digital native who has experience with it and can manage effectively
 - Creativity, Fun
 - 71 percent of users are < 34 years old
- Blogs
 - Employee-focused stories
 - Show culture
- EGC (Employee Generated Content)
 - Empower employees to share their experience being with the company, unfiltered, i.e., an Instagram takeover

Content

- Mobile first
 - Assume audience will be reading on a mobile device
 - Be transparent (over half of new hires have regrets about joining because of lack of transparency)
 - You don't just want new applicants, you want the right ones!
- General Info
 - 88 percent of new hires look to make a change within six months
 - 50 percent new employees have “buyers’ remorse”
 - 70 percent trust online reviews as a source of brand info/reference

Job Descriptions

- Frame in mobile-friendly way
- Hashtags help employees share content
- Algorithms and AI
 - Application hiring
 - Try including games/tests to see different traits to determine predicted success for a specific job
- Deep personalization

HR & MARKETING BREAKOUT DISCUSSION

Participants broke into mixed groups to brainstorm around the following topics:

How to overcome the “non–sexy” industry (industry issue, not just a firm issue)

- Interact with schools (organic)-even starting at high school level
- Tell industry stories in an authentic way (with human element)
- Reframe who you are relative to what you are doing
- Promote growth
- Understand our niche markets and how to pitch them to align with interests
- Go after candidates directly/offer a specific program for them
 - Diversity (must be authentic and not forced)
 - Show ethics, and how it's more than just your “job”

How to deal with the urgency to hire

- Capture knowledge of people who are going to retire
- Mentoring relationship between outgoing employee and new employee
- Panel approach (create an alumni association)
- Identify a common theme amongst successful, older employees
- Convince older employees to stay with the company by offering part-time or something new
- Shift sales to a more of a team environment
- Recruit, train and mentor CSRs because producers/CSRs work in tandem
- Hold high accountability for mentoring

Takeaways:

- **Company Social Profiles:** Ensure your free company profiles on LinkedIn and Glassdoor are complete.
- **Employee Photos:** If possible, use real employee photos and videos on any outward facing materials (avoid stock photography).
- **Internal Advocates:** Identify and train internal advocates to share their story on social media, blogs, etc. Be sure to equip their success by providing clear guidance on social media policies and expectations.
- **Aggregate Employee Content:** If you activate internal advocates, create a branded hashtag for them to use to help you aggregate and share all of the employee-generated content.
- **Minimize Jargon:** Review your career site, job description, etc., to reduce jargon and use relatable copy.
- **Personalize:** Persona map your target hires to tailor your employer branding efforts around the channels and content that will resonate.
- **Be a Content DJ:** Launch social channels on platforms where your target prospects congregate. Share a mix of jobs, company updates, industry information and content your target audience might find interesting or helpful. Most importantly, be sure to listen and engage with your following.

ROUNDTABLE DISCUSSION: STRUGGLES AND SUCCESSES

Participants learned from their peers around the table to gain insights into what works and what does not—on any given issue. This open forum discussion focused on both successes and struggles currently at hand inside of our member brokerage firms. The group discussed the following:

- **Employer Branding & Recruiting** – the prior day’s presentation and joint discussion with the marketing group reinforced how connected marketing and HR need to be.
- **Security Audits** – dealing with former employees’ access to company information. How to ensure immediate restriction of access.
- **On-the-Spot Termination** – with performance management documentation, how to deal with these types of requests from managers. The group advised to look at possible systemic issues (i.e. recruitment, training, management, etc.) and to evaluate the risk exposure with the termination. Is it more detrimental to the organization to keep the employee or terminate immediately?
- **Learning Management Systems** – the group shared success with these platforms:
 - Sabba
 - Cornerstone
 - Litmos
 - Schoox
- **Compensation Bonus Models**
- **Diversity & Inclusivity Initiatives**
 - A good place to start is with unconscious bias training for all managers as an introduction.
- **Performance Management** – firms are moving away from annual performance reviews to continuous coaching and feedback through the year.
 - Technology platforms suggested: Cornerstone, Halogen, Reflektive
 - Plot performance vs. progress to tie to compensation
 - Train managers to be coaches and give in the moment feedback

NEXT MEETING

The next Human Resources in Insurance Working Group is set to take place **September 11–12** at The Council’s headquarters, in Washington D.C. The group decided to focus the next meeting’s agenda on a deep dive into performance management.

QUESTIONS?

Contact The Council’s Elizabeth McDaid at elizabeth.mcdaid@ciab.com.