



## HUMAN RESOURCES

### Working Group

September 22-23, 2016  
Washington, DC

## SUMMARY

The Council's Human Resources Working Group met September 22-23, 2016 at The Council headquarters in Washington, D.C. The meeting was staffed by The Council's Elizabeth McDaid, Julia Ruiz and Tish Carden. Of the 22 participants, 8 were first-time attendees or from new CIAB member firms, underscoring the value of peer-to-peer exchange. The agenda focused on building HR as a strategic partner and introduced The Leadership Challenge which includes the five practices of exemplary leadership – Modeling the Way, Inspiring a Shared Vision, Challenge the Process, Enable Others to Act, and Encouraging the Heart.

## PARTICIPATING FIRMS

In attendance were twenty-two (22) participants from the following Council member firms:

Assurance Agency	Conner Strong & Buckelew	INSURICA
BancorpSouth Insurance	Cottingham & Butler	Kelly & Associates Insurance
BMS Intermediaries	DiBuduo & DeFendis Insurance	Murray Securus
Bouvier Insurance	Gehring Group	NFP
Brown & Brown	Haas & Wilkerson Insurance	Oswald Companies
CBIZ Insurance Svcs.	Harden	The Hilb Group
Clements Worldwide	Hylant	TrueNorth Companies

## THURSDAY, SEPT. 22

### INTRODUCTIONS

The meeting began with an ice breaker exercise which allowed the group to become acquainted with each other.

### HR AS A STRATEGIC BUSINESS PARTNER

*Presented by Marty Guastella, VP Human Resources, Oswald Companies*

This session traced the evolution of human resources –from **transactional** HR services to **strategic** HR business partner. Guastella challenged the group to “raise the bar” and posed the question, “Do we really understand what it means to be a strategic business partner especially in a fast-paced, growing organization?”

*He then offered the following ideas:*

1. Become an effective business leader
2. Learn and understand your business
3. Become an expert in your:
  - Mission, Values, Culture
  - Current Year Business Plan & Strategic Business Plan

- Sales Cycle, Service Process, Support
  - Internal Relationships & Dynamics
  - Key Management Competencies
4. Connect your HR Strategy to the business

Guastella shared the following framework that he has built through his professional experience:



## GOVERNMENT AFFAIRS: POLITICAL UPDATE & INSIGHTS

Presented by The Council's Joel Wood, SVP Govt, Affairs and Joel Kopperud, VP Govt. Affairs

The Council's government affairs team provided insight into the issues that are top of mind for your firm.

## THE LEADERSHIP CHALLENGE

Presented by Roxanne Elliot Kaufman, CEO & President of ProLaurette

The session continued the theme of HR as a Strategic Business Partner by asking the question "What is leadership?" Kaufman explored the five traits believed to exemplify leadership based on the research of Jim Kouzes and Barry Posner, the authors of Leadership Challenge. The characteristics are as follows:

### Five Practices of Exemplary Leadership

#### 1. Model the Way

- Find your voice by clarifying your personal values
- Set the example by aligning actions with shared values
- Source of Credibility
- Characteristics of admired leaders
  - Trustworthiness = Honesty
  - Visionary = Forward Looking
  - Dynamism = Inspiring
  - Expertise = Competence
- Clarify and articulate the values that will guide your decisions and actions as a leader
- Do what you said you would do

## **2. Inspire a Shared Vision**

- Envision the future by imagining exciting and ennobling possibilities
- Enlist others in a common vision by appealing to shared aspirations
- Make a difference
- A vision is an ideal and unique image of the future for the common good
- Components of a shared vision
  - Ideals
  - Unique
  - Images
  - Future-oriented
  - Common good
- Delivery/language and themes can affect how others are inspired

## **3. Challenge the Process**

- Search for opportunities by seeking innovative ways to change, grow, and improve
- Experiment and take risks by constantly generating small wins and learning from mistakes
- Seize the initiative
- Outsight – In the context of shared vision and values, look for new ideas outside the boundaries of the organization
- Little Bits – Take incremental steps in applying new and innovative solutions
- Safe Zones – Create a climate in which people are willing to take risks and learn from mistakes

## **4. Enable Others to Act**

- Foster collaboration by promoting cooperative goals and building trust
- Strengthen others by sharing power and discretion
- Collaboration and Team Work
- Behaviors that make people feel powerful are enabling, and those that make people feel powerless are disabling
- Feeling powerful is likely to bring out the best, most positive, most committed energy and performance
- Making people feel capable and valued is at the heart of trust – the essential ingredient in people's willingness to take risks that can drive extraordinary results
- Leaders build trust by using The Secret Sauce - Love

## **5. Encourage the Heart**

- Recognize contributions and celebrate victories
- Give examples of meaningful recognition
- Identify actions you can take to encourage the heart of your team members
  - Expect the best
  - Personalize recognition
  - Create a spirit of community
  - Be personally involved

It was proposed that the HR Working Group go through the Leadership Challenge workshop over the next two years but dedicating a ½ day of each meeting to the program. The group unanimously accepted this proposal.

## FRIDAY, SEPT. 23

### ROUNDTABLE DISCUSSION- STRUGGLES AND SUCCESSES

The group identified the following struggles: establishing an effective diversity and inclusion program, shifting recruitment to attract woman to insurance and producer roles, and finding ways to identify and combat unconscious bias. The following success story was shared: Using different recruitment and training programs to educate those new to insurance.

### PRACTICES FOR EFFECTIVE TEAMS

*Presented by Connie Merchant*

Merchant introduced “*The Five Behaviors of a Cohesive Team*” model created by New York Times best-selling author Patrick Lencioni which helps people discover what it takes to achieve the ultimate competitive advantage of teamwork.



- **Trust** One Another  
When team members are genuinely transparent and honest with one another, they are able to build vulnerability-based trust.
- Engage in **Conflict** Around Ideas  
When there is trust, team members are able to engage in unfiltered, constructive debate of ideas.
- **Commitment** to Decisions  
When team members are able to offer opinions and debate ideas, they will be more likely to commit to decisions
- Hold One Another **Accountable**  
When everyone is committed to a clear plan of action, they will be more willing to hold one another accountable.
- Focus on Achieving Collective **Results**  
The ultimate goal of building greater trust, conflict, commitment, and accountability is one thing: the achievement of results.

## MILLENNIAL WHITE PAPER

*Presented by Warren Wright, Executive Vice President of LifeCourse Associates*

Millennials are the latest generation to arrive in the workplace and are the most perplexing to their Baby Boomer and Generation X managers. Beginning in November, we are embarking on a comprehensive research project to uncover and bring to light some of the best practices in attracting and retaining Millennial employees in the commercial brokerage business.

The results from the interviews, plus results from a larger survey of our members will be consolidated and published in a research report and available to all Council members in the first quarter of 2017.

## NEXT MEETING

The following topics were suggested for future meetings:

- Creating Women Advancement Paths – How do we maximize their potential?
- Sales Training – sales curriculum and culture
- Producer Competencies
- M&A – Change Management. How you integrate teams together. How do change initiatives succeed?
- Unconscious Bias

The next Human Resources in Insurance Working Group is set to take place in conjunction with The Council's Legislative Leadership Summit, **February 6-7, 2017**, in Washington D.C.