

Corporate Award of Merit

Trillium Mutual Insurance



Introduction

In the past three years, Human Synergistics Canada has conducted an Organizational Culture Inventory™ Report for Trillium Mutual Insurance. Their results have shown continuous improvement, and in their third year achieved what many organizations struggle to do; they have achieved an overall Constructive profile. *How did they do it?* And most importantly, ***what difference has it made?***

Company Background

Trillium Mutual Insurance Company (TMI) was formed in 2004 with the amalgamation of two legacy companies, Formosa Mutual which was founded in 1880 and Elma Mutual Insurance Company which was founded in 1884. The foundational success of the amalgamation was the balanced leadership that was drawn from the two legacy companies, in the formation of Trillium Mutual during the integration phase following amalgamation.

TMI is an Ontario based member owned mutual insurance company. It is one of forty such companies in the province and is the second largest based on gross premiums written (annual sales). It relies on independent business partners to retail its products, and is strategically expanding its membership footprint across the entire province, from a traditionally small geographic region in mid-western Ontario.

The company's business philosophy is to provide leading products at competitive pricing through superior talent and relevant technology. It is aggressively pursuing farm and agri-commercial business with the goal to be the "farm insurer of choice" in Ontario. In 2013 it launched a dedicated brand "Real Ontario Farm Insurance" with the motivation to develop best in class insurance professionals at the distributor and company level.

TMI's leadership is focused on strategically investing in talent and technology and in 2016 expanded the strategic planning process to include a Talent Plan and a Technology Plan. Leadership's bias is that both of these areas are critical to long-term sustainability.

TMI is a leader in philanthropy, environmental sustainability as well as corporate social responsibility.

Culture Description

The Organizational Culture Inventory™ (OCI) measures the operating cultures of organizations in terms of behavioural norms, or "What's Expected" of members. Culture, then, is the consciously held notions that most directly influence members' attitudes, values, beliefs, and behaviours. Human Synergistics measures culture along twelve styles that are grouped in three clusters – Constructive (blue), Passive/Defensive (green), and Aggressive/Defensive (red).

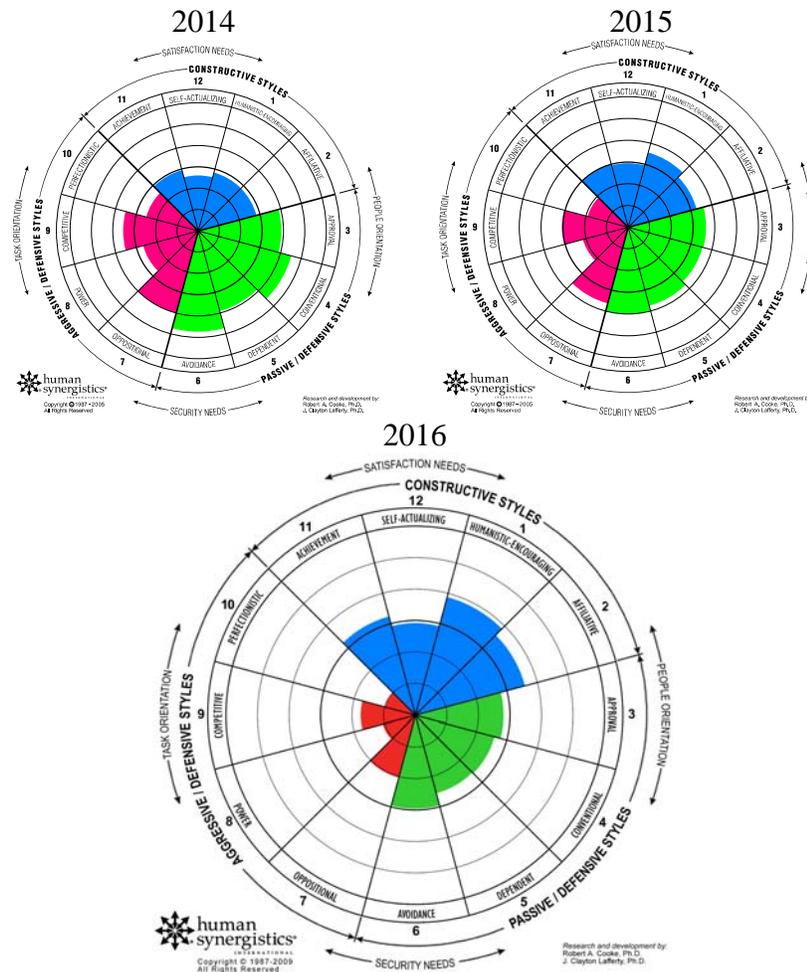
Organizations with Constructive Cultures place a high value on service and product quality, goal attainment, and the development of their people – where quality is valued over quantity; creativity is valued over conformity; and cooperation is believed to lead to better results than competition. Through individual initiative, effective team work, and cooperation, the products and services offered by constructive organizations tend to be of the highest quality.

The scores for members of an organization are aggregated, plotted on a profile and, in the process, converted to percentile scores based on statistical norms drawn from years of research that allow objective comparison of styles within and across organizations.

The overall culture of Trillium Mutual Insurance in 2016 was Constructive. Their primary style was *Humanistic – Encouraging*, scoring at the 72nd percentile; this means that Trillium is more *Humanistic – Encouraging* than 72% of all organizations. Their secondary and tertiary styles are *Affiliative* (65th percentile) and *Achievement* (56th percentile) respectively. We can compare this to their highest defensive styles of *Avoidance* (49th percentile) and *Approval* (45th percentile). All of their constructive styles are higher than that of the defensive styles (with the exception of Avoidance, by 1 percentile score).

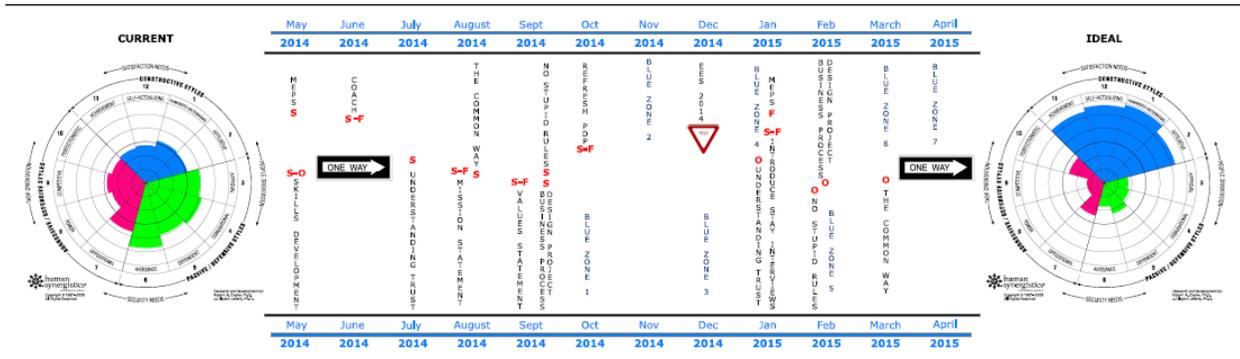
This means that Trillium is a great place to work! It's a place where people are encouraged to achieve their personal AND organizational goals with enthusiasm, to grow and develop themselves and their teams, to cooperate with one another, and to think in creative, innovative ways.

As indicated by the OCI results below for Trillium, in the past three years they have continuously improved their constructive styles while also decreasing their defensive styles.



Causes – How did they do it?

Early on in Trillium’s cultural change journey, the leadership team identified their direction and focus by aligning their Ideal culture with their strategy. It was determined that their culture was a significant factor in achieving their organizational objectives. An Employee Leadership Council (ELC) was formed to be both the voice of employees to leadership and vice versa. The council helped to drive change initiatives and identify opportunities within the organization and its leadership group. This group met on a regular basis to discuss progress and areas for improvement. From the collaboration of the ELC and Leadership Team, a Journey to Ideal was established. (see Image)



The first stage of the journey was leadership development. The Leaders at Trillium have undergone Leadership Development programs to improve their self-awareness and to define leadership at Trillium. Human Synergistics was an integral part of these programs, using the Management Effectiveness Profile System (MEPS) and Coach Simulation. They have worked hard to become more flexible in terms of the types of training that are needed, some of which is/was determined by the ELC.

Based on the leadership team’s results from the MEPS assessment, seven key skills were identified as areas for improvement; these were titled “Blue Zones” in their journey roadmap. Over the course of a year, time was dedicated for developing and/or improving each of those seven skills and programs were delivered to assist in their development.

The Leadership Team also began a book club and began with “The Speed of Trust” by Stephen Covey. Trust was an area that was identified by the ELC and Leadership Team as an important factor in the success of their cultural change Journey.

In the strategic development and alignment of Culture, “The Trillium Way” was developed and outlined the guiding principles of Trillium as an organization and its employees. Aligning the Trillium Way with the values of the organization has provided clear direction and focus to its executive leadership team and all employees of Trillium.

Human Resources processes have changed and adapted to the kind of Ideal Culture identified. The focus was shifted to the total employee experience; the whole person, and a more Human Approach. They made a commitment to take care of employee’s wellbeing, both mentally and physically. The Trillium building was designed around the employee experience and included key features such as a gym and large kitchen areas to house commercial refrigeration so that employees could not only keep their lunches there, but could do their grocery shopping during their personal time and keep them in the fridges at work. Volunteering and giving back to the community is very important to the organization and encouraged at the individual level.

There were changes made to recruitment where the focus was not on process but on the candidate experience. Their time in recruitment was spent getting to know the candidates as people and sharing with them who Trillium is, and how this role factors in to the success of their department and organization as a whole. The onboarding is much more personalized. Each new hire receives a gift from Trillium before they start. In an effort to make new hires feel more comfortable, they ask everyone to wear name tags; this may seem inconsequential however it shows a new person from the very beginning that they are joining a team that supports each other.

From a Professional Development perspective, training dollars are allocated for each person to help them learn and grow professionally for their current and future roles at Trillium.

The Policies and Employee Handbook was reviewed and changed drastically to remove many policies that are unnecessary. They moved to more “Discretionary Leadership” by giving the leaders the information and resources they need as well as the ability to make their own judgement calls regarding their resources, most importantly their people. They called this “No Stupid Rules.”

People’s personal situations are dealt with on a case by case basis and are striving to deliver the right support for employees experiencing major life events.

The TMI leadership team focused on changing the language that management and staff use. A needs assessment is ongoing at Trillium to identify any process that hinders them from providing exceptional customer service or being collaborative and creative. An example of this is “Working Conditions,” which is a term that is no longer used as it felt too rules based and not conducive to the journey to Ideal. Instead, the organization chose “Working at Trillium”.

Integrating technology and providing tech solutions in the way that people do their work has assisted with the flexibility that Trillium can offer their employees. They offer each staff member a laptop, which provides them with the opportunity to work from home when needed or as part of a work life option. Their philosophy is that flexibility is viewed as an essential element in achieving their organizational successes. This value added service gives employees flexibility and has helped to garner trust amongst leaders and their direct reports organization wide. This people strategy is first of all a partnership between TMI and the employee. This strategy is not a one-time effort. They will continue to revisit this strategy to make sure they are offering what is needed and appropriate.

Trillium also introduced an innovative, collaborative performance development process, whereby leaders and employees work together to develop professional development goals that are tailored to each individual. They use a Balanced Score Card approach where their Values and departmental and organizational goals are being incorporated into everyone’s PDP. An individual’s PDP helps to identify how their individual effort contributes to their departments’ goals and the overall organizations’ goals. Conversations about career development have been expanded to include both education and advancement opportunities as well as more cross training opportunities for staff made available and more people taking advantage of those opportunities. There are 4 touchpoints throughout the year to check in on these plans as well and to incorporate more discussions on career development. An Individual Learning Plan tool is used as a roadmap to facilitate the planning and discussions. Stay Interviews were implemented to get an understanding of how things are going and if there are any interventions required in order to maintain their constructive culture.

They make a conscious effort to ensure that they are being transparent in their communication with staff, peers and leaders. Open forums have been added to the staff meeting, where everyone breaks off into smaller groups to discuss any questions or concerns they may have, success stories to be shared, opportunities for improvements, etc and then have an elected speaker for each group. They've expanded their conversations with their staff, and being open to having conversations that they might have previously avoided.

Outcomes

The results of Trillium Mutual Insurance's Organizational Culture Inventory in 2016 shows that employee opinion of the organizations Quality of Service and Employee Satisfaction is greater than that of the top 15% most effective organizations.

As a result of Trillium's commitment to creating a constructive culture, their employee absenteeism rates are extremely low, if not non-existent, and they are experiencing significant growth. In 2016, five new positions were created. Because of their recruitment processes, they are confident they have the right people in the right roles but who also fit into the culture of the organization and will drive the organization forward. Employees trust and respect each other and work as a team, at all levels. They are encouraged to approach their work in creative, innovative ways and enjoy doing so.

Customer and Employee satisfaction have also improved, which is also a testament to their growth.

What Employees are Saying

- In the past, if a leader had to talk to someone about a mistake or a problem, they often used blanket statements in a group setting so that they didn't have to talk to that person alone. Everyone on the team knew who and what they were talking about, but it was dealt with in a group setting. Now things are dealt with right away, and in private.
- I'm treated like an individual.
- If I had to describe the culture at Trillium in three words, I would say Trust, Respect, and Flexibility
- There is a sense of pride working for Trillium. We're proud to tell people where we work
- The new PDP process makes it very clear how my individual contributions affect the success of the organization.
- I'm motivated to do more
- There is mutual appreciation between the organization and individuals. We know that the organization appreciates us and the work we do, and we appreciate everything that Trillium does for us.
- There are so many perks working for Trillium; there's a gym, there are family days, volunteer days, and they give back to their community
- Because of the continuous changes that have happened and the changes made in the culture, we feel more resilient and confident.
- Being new to Trillium, everyone was welcoming. I was made to feel competent and important.
- We have a common goal, there is a clear vision, clear communications, and less conflict and more positive energy than my previous employer. Anyone can say anything, and it's ok.
- It's ok to be yourself here
- All of the opportunities that they provide, education and training that they offer,

and everything that they do here feels so innovative and creative. It's like working for google!

- We have the freedom to do our work the way we want.
- Management walk the talk; everything they promised through the recruitment process, they provided
- People are recognized for the work that they do from the CEO all the way through