

Protective Life Establishes Employee-Manager Alignment With Reflektive Check-Ins



THE CHALLENGE

The traditional performance management model, with goal-setting in January and an evaluation at the end of the year, was not meeting the needs of the modern workforce, which has shifted from production to knowledge work.

Protective identified three business needs:

- ▶ Enable coaching and development of talent through continuous feedback
- ▶ Streamline and simplify the performance review process
- ▶ Transition from annual process to quarterly check-ins



We were HR police — managers spent an inordinate time just getting through the process instead of having a real, genuine conversation with the employee.

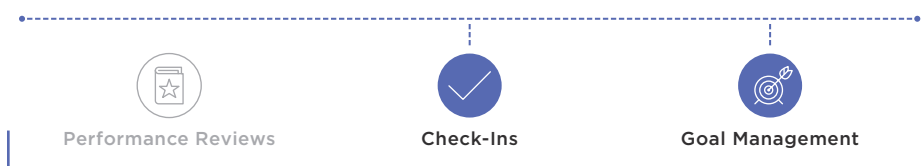
Wendy Evesque — Protective's Chief Human Resources Officer

THE SOLUTION

After running interviews, an employee survey, looking at outside research and doing a design workshop, Protective identified quarterly check-ins as the program that best fit its needs. Now, the company needed a technology solution that could deliver on the requirements of its forward-thinking program.

Why Protective chose Reflektive:

- ▶ Simple and lightweight
- ▶ Future-focused, strength-based
- ▶ Continuous communication
- ▶ Ownership of performance



REAL-TIME FEEDBACK & RECOGNITION



Financial services holding company Protective Life's primary subsidiary, Protective Life Insurance Company, was established in 1907 and now markets its products and services in all 50 states. With a market capitalization of \$5.48 billion as of September 2014, Protective is listed in the 2012 Fortune 1000 list.

In 2015, Protective Life was acquired by Dai-ichi Life Holding, Inc. The new parent company set out an aggressive growth plan for the Birmingham, Ala.-based insurance company. With a tenured workforce, Protective needed a performance management plan that would optimize retention and employee development.

FINANCE
Industry

1907
Year Founded

BIRMINGHAM, ALA.
Headquarters

2,500
Employees

MISSION
Protect tomorrow, so people can embrace today

VALUES
Do the Right Thing,
Serve People, Build Trust,
Simplify Everything

Protective's new program drives alignment between managers and employees

Protective eliminated their beginning-of-year goals and annual review, and implemented quarterly goal-setting and check-ins, with an end-of-year rating, through Reflektive.

"When we started redesigning our performance management process, we decided to do quarterly check-ins, and found Reflektive," Wendy said. **"The system didn't need a lot of training because it was very intuitive."**

THE RESULTS

Protective's new program drives alignment between managers and employees, and helps employees know they're working on the right things. Using Reflektive's lightweight, intuitive solution for real-time feedback and check-ins enables managers to focus on the conversation, not the technology.

In turn, the company is poised to meet growth goals, knowing **employees are being developed all year long.**



IN THE TOOL

10 minutes

HAVING A CONVERSATION

20-30 minutes

Managers are spending 10 minutes in the tool and 20-30 minutes with the employee, having a conversation. This balance ensures **managers are leading as coaches, not caught up in a bureaucratic process.**



90 DAYS

40% INCREASE

Protective **increased by 40%** the number of people who say they understand exactly **what they should focus on in the next 90 days**, increasing alignment between company and individual objectives.



"I KNOW WHERE I STAND WITH MY MANAGER"

92%

92% of employees agree with the above statement, illustrating the presence of psychological safety, which **enables good teamwork.**



Our customer demographics are changing, the needs of our customers are changing, we're seeing HR evolve to meet those needs. We've got to be focused on talent — how do we coach and develop people — how do we give feedback? It has to be something that's happening every day.



Wendy Evesque

Protective's Chief Human Resources Officer



We recognize that the talent people bring to us is really going to be the sustainable competitive advantage.



Stephen Owens

Protective's 2nd VP for Learning and Talent Development