

K2 & AXA Insurance (UK) – transforming the culture in a key part of the organization

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Abstract

Purpose – K2's work with AXA (UK) has developed from a single "athlete at work" workshop for one manager into a high-performance coaching program across 40 claims teams in multiple sites. It also formed part of AXA's Fast Forward initiative for accelerating individual talent. This paper aims to explore how the program developed at such scale, changing the inherent performance culture within AXA's critical claims business and giving the teams improved control over their results outcome.

Design/methodology/approach – Delivery of K2's elite team program to front line claims teams and management personnel was designed to inspire confidence, improve morale and establish a network of support, thereby triggering a sustainable cultural change within the organization and all-round better performance.

Findings – The author demonstrates how a structured, premeditated performance program can often lead to unexpected, organic shifts in behavior that positively influence and alter a company's future outlook and performance ratio. By taking ownership of new styles of working, leaders can inspire and innovate through workforce participation, creating highly beneficial standalone initiatives that are adopted into the business on a permanent basis.

Originality/value – The article summarizes the relationship between K2 and AXA Claims, the difficulties facing both staff and leaders at the outset of the program, and how K2 set about effecting lasting change through use of individual and team techniques and methodologies.

Keywords Performance, Coaching, Talent, Training, Team working, Human resource development, Suman resource strategies

Paper type Case study

As specialists in high performance coaching, K2 Performance Systems help the corporate world to think, prepare and perform like elite athletes. AXA is one of the top three insurance groups in the world. Headquartered in Paris, it employs 175,000 staff globally and offers financial protection in the form of packaged and bespoke insurance products to more than 67 million people.

K2's work with AXA (UK) has developed from a single athlete at work workshop for one experienced manager in 2005 into a high performance coaching program across 40 claims teams in multiple sites. It now forms part of AXA's Fast Forward initiative for accelerating individual talent. The program continues to develop as K2 helps AXA Claims to become independently high performing by embedding high performance principles into its culture.

The K2 team spent time with the AXA Claims senior management team prior to the commencement of the project to better understand its vision and agree exactly what success looked like for the program. The brief given to K2 was to deliver, consistent, sustainable performance improvement within the front line Claims teams. K2 then met with individual team members in their workplace, stepping inside and absorbing their world, so they could focus on shaping the program to be completely relevant to their

environment. The enthusiastic and committed support of individual AXA staff, from senior managers to team leaders and team members, together with K2's passion for what it does, has united to form a solid power base that has shaped the success of AXA Claims' performance development.

Program development

As this was a large multi-location project, K2 appointed a coach at the outset of the program to the role of project manager, with a key responsibility being to manage the communication both internally with the K2 team and externally with AXA. AXA's K2 elite team kick offs began with five pilot teams in April 2008. The kick offs were two day sessions where the teams developed a shared understanding of team performance and a team plan including their purpose, performance goals and agreed attitudes and behaviors. This was followed by 15 more as part of stage two and a further 20 in the summer of 2009. These teams comprised the front line Claims teams dealing with the public, third parties and intermediaries, while stage two also included the Claims leadership team, which by now was keen to experience the benefits of the program itself.

Together with K2, the initial five pilot teams in 2008, across four different locations in the UK, set up an internal blog where team members and leaders, and their coaches, had the opportunity to share successes, post pictures and stories, and share challenges to provide help and encouragement. This inspired the pilot teams to feel a part of something that was bigger than just their group, and gave the teams and their leaders a network of support that had not previously existed.

A long-term approach

A key element of the program became the development of a pool of performance leaders from within AXA, which took on the mantle of the K2 coaches and delivered the AXA elite team program (with background support) to the next 15 teams at the start of their performance journey in 2009. This led to long-term sustainable cultural change within the organization using K2's tools, processes and philosophy.

These performance leaders were chosen from within the business following a selection process that invited and assessed volunteers, selecting those whose enthusiasm and communication skills made them stand out as people who could fulfill this challenging role. Some were team leaders who had experienced the program first hand, but had little or no experience of presenting or coaching. The way these people rose to the occasion and engaged the teams they worked with, some of which were very challenging, was an inspiration and great source of learning. Throughout this time these performance leaders carried on in their day-to-day roles, continuing to coach individuals and teams in their structured elite team coaching role, and applying their new knowledge and skills to themselves and others.

Giving the team control

One of the high performance principles on which AXA had been focusing involved helping the Claims team members to develop a sense of control over their performance. We employed this principle throughout their work, encouraging AXA Claims staff to be and feel in control of the program in as many ways as possible. Much of the work centered on K2's elite team program, which uses tools and techniques that have been proven to make a difference in the most testing of arenas, helping create, build and sustain teams with shared values, purpose and goals.

While the elite team program principles are consistent across teams and businesses, their application is unique to each and every team, so that individuals and teams have every opportunity to go on their own performance journey, be curious about how good they can be, and fuel their own motivation. The use of a K2 coach after the initial kick off work is essential to the program's success, and teams are challenged by their coaches to set their own goals and feedback mechanisms, and challenge themselves and their own business with ideas for performance improvement. Teams are encouraged right up front to define performance as "what you do to get the results you aim for" and to then focus on those things that they can control.

Achieving inspiring results

K2's experience of working with the AXA teams has reinforced the belief that not only can poor performing teams with low morale lift themselves and produce excellent results, but that already great teams can become even greater. One team in AXA's Haverhill office, recognized by the company as a great team and a winner of the previous year's team award, took it upon itself to find out about the program. It used the principles it learnt to develop its own performance even further. In some parts of the Claims department, teams were asking when it would be their turn to be a part of the program because they saw colleagues in other teams more motivated and more connected with one another.

Feedback from the senior leaders in the business referred to "remarkable stories," "significant progress" and a "tangible uplift in results," which was being achieved through "people clearly engaged and passionate" and the commitment to "bringing about this cultural shift."

Furthermore, these results were achieved through a period of great uncertainty and change during the back end of 2008 and the first half of 2009 including severe cost challenges, restructure and redundancies. In 2010, AXA Claims designed an award for the elite team of the year, with the winning criteria focused on performance improvement rather than simply bottom line results.

AXA Claims Team Award 2010

This award was designed to embed learning within teams, encourage learning and communication across work streams (AXA Claims encompasses teams working in commercial property, commercial motor, personal insurances and others), to be fun, and to involve the senior leadership team with front line teams. It was also intended to be used to illustrate the elite team program outside of the Claims department.

The award was open to any team in AXA Claims irrespective of whether they had been a part of the AXA K2 elite team program. Each senior leader was asked to nominate a team from their area based on any or all of the following five criteria:

1. Connectedness – a team that supports each other to achieve the highest levels of performance they can.
2. Resilience – a team that demonstrates an ability to maintain a sense of control and perform in challenging circumstances.

“... teams are challenged by their coaches to set their own goals and feedback mechanisms”

3. Mutual accountability – a team that is mutually accountable for its own performance, but also shows accountability for the performance of AXA Claims.
4. Desire to improve – a team whose desire to improve can be seen by the way it tries new things and always looks for ways to get better.
5. Talent alone is not enough – a team that uses its collective talent as a starting point and works hard to maximize all the talent it has available.

All nominated teams were invited to make a submission for peer review by other nominated teams. Because the nominated teams were from four different UK locations these were circulated electronically and teams voted on their top three. David Williams, head of AXA Claims, judged the top three teams against the five criteria to decide an overall winner.

Needless to say the enthusiasm, motivation, quality and performance of all the nominated teams was exceptional. A notable feature of all their submissions was the emphasis on why their results were important to them and even more significantly how they had produced their results and how they planned to improve their performance even further.

Feedback from the teams

Often the steps taken by teams were simple but highly effective. For example:

... through communication and organization, the team now hit service levels that they all agree has reduced stress levels among staff and customers, therefore making everyone involved happier.

Another result was:

We are not afraid to try new things. If they don't work, we think "never mind, at least we tried", so let's go back to the drawing board.

Another nominated team described itself at the outset:

Our work state was at very high levels, we were way behind target on post, diary and phones and we couldn't see a way of getting out of the situation that we were in. Every time we thought we were getting somewhere, something else would happen. We had people moving out of the team into other areas of the business as well as people moving to other companies. It felt like we were under constant pressure and couldn't see a light at the end of the tunnel. We were very much in victim mode, however we wouldn't really accept this.

However, it managed to turn this around through some key changes. Following are those changes in its own words:

- We started by looking at ourselves.
- We identified the different strengths within the team.
- We looked at how we could use these.
- We discussed accountability and ownership within the team.
- We talked to each other and listened.
- We agreed processes as a team rather than the team manager telling everyone what to do.
- We did not dismiss new ideas, no matter how off the wall they were.
- We developed the confidence to challenge more.
- We took the courage to take risks.
- We developed connectedness and respect for each other.
- We became proud of ourselves and our achievements.
- We have kept a clear focus on our input rather than our outputs.

“... the enthusiasm, motivation, quality and performance of all the nominated teams was exceptional.”

- We invented what we called our “Cheeseboard”, which is a fun and visual way to share our successes, what we learned, compliments from each other and customers, and to “blow our own trumpet” and just say thank you.
- We had the support from our unit manager whose hands off approach has helped and allowed us to make recommendations and trial things.

A number of the various AXA Claims office locations have continued to use an annual team award to recognize great team performances.

Ongoing delivery of performance improvement

The years 2010 and 2011 have seen K2’s strategy and tactics continue to evolve to find new ways to help AXA Claims make performance improvements. It now coaches a smaller, select number of teams directly, but as part of the transfer of skills to allow AXA to sustain its own culture of high performance development, K2 worked with team leaders, unit managers and middle managers to help develop their own coaching skills and practice. This part of the program has been crucial in helping AXA continue to make the most of its investment, seeking to ensure that learning is applied, gains are maintained and, perhaps most importantly, that through a thorough understanding of the overall aims, objectives and practices of K2’s high performance principles, the work is not undermined in any way, for example, by arresting control back away from the frontline teams.

The 2011 program for team leaders across four sites has taken different paths as the managers and team leaders themselves have fed back to K2 what they have found most useful, and what they want and need from the next part of the program. In one division of the Claims business, this took the form of one-to-one performance coaching, with the explicit K2 belief that performance coaching, unlike the general, typical, application of performance management, is as much for those who are already great at what they do as it is for those who are not fulfilling their potential.

In another part of Claims, the team leaders themselves have been completing K2’s athlete at work online program (a program that focuses initially on individual performance) with regular group review and planning sessions with a K2 coach. Those team leaders now have the athlete at work online tool available to use for any or all of their individual team members. Once again, the team leaders, in conjunction with their teams, are in control of how they use this performance tool, some choosing to use it across the board, some only with certain individuals, and others with particular modules being worked through together by a team in unison.

Expanding the program

Conversations are well underway about what support, if any, AXA Claims needs from K2 in 2012 and beyond. David Williams, who was head of AXA Claims during this period, now leads both Claims and Underwriting, and discussions are taking place to see what Underwriting can learn from the Claims experience.

AXA's own commitment, both in terms of investment of time (the elite team coaching extends over a 12 month period) and money, together with K2's expertise, in depth coaching resources and project and relationship management, have together formed a powerful partnership designed to produce consistent, sustainable performance. The value of AXA's investment in the five-team pilot and beyond cannot be underestimated. K2 knows and appreciates that many traditional training programs fail because they neither encourage nor allow long term, sustained behavioral change. K2's and AXA's commitment to coaching and belief in that approach has enabled K2's definition of development, that "learning only takes place when it results in a change in behavior" to come to life. And the results from that new behavior have been impressive.

About the author

Jim Constable, after 15 years in the financial services sector, made a concerted move into the coaching world, optimizing his sport science degree and deep-set passion for sport, and is now a performance coach with K2 Performance Systems. An accomplished coach and communicator, he constantly pushes the boundaries of his own comfort zone, and in addition to working with a raft of individuals and teams on a range of performance programs is currently working towards a Master's degree in Applied Sport Psychology. Jim Constable can be contacted at: jimc@planetk2.com

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