

**Learning Leaders – The OD Way**

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## **Learning Leaders – The OD Way**

### **Abstract**

A learning space at Liberty General Insurance was transformed in an OD way. In turn, the program is now influencing the culture of the organization. Even though its genesis has been in the corporate office, by its very essence of being, the program is spreading to other branches and is making the system more inclusive. While it was initiated by HR, it is now fueled and owned by the employees themselves. The program is helping employees showcase their knowledge & skill and add value.

## **Introduction**

Headquartered in Mumbai, Liberty General Insurance Ltd. commenced operations in 2013 with the aim of providing comprehensive retail, commercial and industrial insurance solutions. The organization has grown to an employee strength of 1000 full time employees and 61 active branches.

Liberty General Insurance is a joint venture between Liberty City State Holdings PTE Ltd, a group company of Liberty Mutual Insurance Group (Headquartered in the US), and Enam, a privately owned and managed firm that makes long-term investments in listed companies (also backs entrepreneurs building valuable private companies) and Diamond Deal trade Limited belonging to the reputed D.P Jindal Group Companies of India.

With a paid-up capital of Rs. 1084 cr, Liberty General Insurance Limited, is one of the most well capitalized General Insurance companies in India with high solvency, signifying financial strength.

## **The Beginning**

Being a young start-up, the organization had a close-knit familial culture. Work volumes were low and there was enough time which could be invested in development. More importantly, there was a need to keep the task force at Head Office energized, engaged and motivated. Thus, 'Learning Leaders' emerged.

'Learning Leaders' was an HR-initiated forum wherein employees would be introduced to a new concept or skill pertaining to behavioral aspects. The fortnightly sessions were open to all staff at the Head Office. Initially, the internal L&D (Learning & Development) person would conduct brief sessions on various developmental topics. The sessions typically lasted between 1 to 2.5 hours. Over a period, a few managers volunteered to conduct sessions on topics of their choice. Gradually, external speakers were invited to share their knowledge and skills in this space. Some of these introductions to Consultants grew into working relationships. Long-term engagements began to develop through this space.

## **The Problem**

From a business perspective, the volume of work gradually began to increase and the organization also started to grow. As a result, the employee attendance in the 'Learning Leaders' forum began to dwindle. The frequency of sessions reduced first from fortnightly to monthly, then to ad-hoc and eventually became sporadic. Some of the new employees weren't even aware of the 'Learning Leaders' forum.

## **Context**

Some environmental factors that may have influenced this are

- Business requirements for technical trainings increased which then became L&D's priority
- 'Learning Leaders', being more in a developmental space, began getting de-prioritized

This threw light on the bigger picture: Organizational re-structuring had taken place, which led to job insecurity amidst some employees. Work took priority over development or engagement related initiatives. Developing oneself may not have been viewed as work.

## **Revival**

In 2016, with the appointment of an OD Consultant, 'Learning Leaders' was identified as a forum to be revived. Initially, monthly sessions were conducted by a Consultant on behavioral aspects like Appreciative Inquiry, Unconscious Bias Awareness, Executive Presence and Creative Visualization. Listed below are the findings from the initial experience:

- The depth of work achieved in an hour was fulfilling and effective
- 3 to 4 participants would attend all Learning sessions
- Participation numbers were low ( 6 to 12 participants out of the 300 employees at Head Office)
- Positive Feedback gathered from the attendees
- Within 2 months of reviving the sessions an employee elicited interest in sharing his knowledge on meditation techniques

The company encouraged and guided the employee to facilitate a session on meditation techniques. 15 employees were part of the session and the facilitator expressed his gratitude for the valuable opportunity.

*“Thank you for sharing this space with me. It is a big deal to allow someone else into the space. I enjoyed the experience of facilitating the meditation session. We should do this more often for our employees.”*

The experience was a huge confidence boost to the employee. Meditation as a topic seemed to be of interest to employees, given the demands of the job. It also became evident that some employees had their finger on the pulse of their colleagues’ interests. Several requests came his way for another session, from those who missed the first one. Consecutive sessions were held once a month or once in two months. Each session was attended by 12-20 employees.

Given the response to the session being conducted by an employee representing a business function, the following session was planned in co-facilitation with a Manager of Customer Service team. The topic chosen was one that she was passionate about and wanted to explore more - ‘Shadows’. She was actively involved in designing this introduction session to Shadows. She was able to add value through her inputs and learning. In the process, she was also exposed to a different style of facilitation. This session witnessed the participation of two CXOs with a total group size of 12 participants. Post this experience, she showed more confidence in facilitating topics on Diversity & Inclusion for the induction batches in addition to giving them an orientation in Customer Service.

The following conclusions were drawn from these experiences:

- Employees were more responsive to sessions being facilitated by one of them
- Witnessing a colleague facilitate a session and receive an encouraging response, motivated others to take a lead and leverage the forum
- Participants were seeing more of their colleagues as persons with new skills and knowledge

- Facilitator's skills and confidence were being built, in addition to deeper subject understanding
- The experience seemed to provide a new learning and/or a break from routine work for participants
- For some it was a bonding and/or engaging experience
- The participation groups seemed to have a shared sense of oneness, camaraderie and pride
- Comfort and familiarity in this space seemed to increase with each session
- Post the session, there would be a floor talk– word of mouth was an effective tool

The interest in this space grew as more and more employees (those who attended and those that didn't) reached out to the facilitator for inputs.

### **The Way Forward**

Employees' response to the forum began shifting favorably, as it started to become a shared platform. The question now was, how do we move ahead?

### **Methods and Process**

Given that there was now sufficient buzz about 'Learning Leaders' at the Head Office and a sense of familiarity with the forum, a survey was initiated. The survey asked employees –

- Which of the existing offerings were of interest to them?
- Which skills would they like to learn?
- Were there any skills or knowledge they would like to share through this platform?

The survey, which was intended to gather data, turned out to be an intervention. The inquiry, led to around 7 to 9 staff volunteering to share their knowledge on various topics of interest to them. This was encouraging.

The response rate to the survey was 12%. The survey was sent out to 254 employees out of which 31 responded.

## **Outcome**

A communication was sent to all staff at Head Office from the President – HR desk conveying the following –

- Thanking survey respondents
- Communicating the calendar for the quarter based on selections made in the survey
- Acknowledging previous facilitators for their contributions
- Conveying the intention to expand the reach of the program to branches

The process of connecting with volunteers and determining their skills and readiness to facilitate various sessions began. The topic ranged from personality development to personal transformation, industry knowledge, as well as engagement-related topics like skills, hobbies and interests. A few employees volunteered to conduct sessions on topics of their expertise outside of the survey. The survey opened a gateway to an internal pool of facilitators.

It was hence decided that every quarter, a survey would be conducted. Based on the survey results, a quarterly calendar would be announced. However, given the number of volunteers that began to emerge, this need to conduct a survey was eliminated. The experience also suggested that a certain employee's offering is of interest to several others due to the relationship and rapport they shared either having worked together as a team or across teams. There was now an advance booking for sessions at Head office.

The ball began rolling with sessions on Spanish, The Secret-Law of Attraction, Bharatnatyam, Tax Saving and industry related topics like Re-insurance. Employees were energized to participate in learning sessions led by their own team members.

This energy found expression in how the sessions were being communicated:

- The email invitations now featured the facilitator with some information about their skills and credentials

- The program received more visibility through posters that decorated the walls of the office
- The over-head announcement system was leveraged by the facilitator to invite everyone to the session. At times, these audio messages would be creatively crafted to grab everyone's attention and have the office break out into laughter

### **Acknowledging Volunteers**

- The volunteering transformed the meaning of 'Learning Leaders'. It had now become a title for employees who would lead the learning sessions
- These 'Learning Leaders' were acknowledged in town-halls. A reaction to this– *"I was so happy to see the picture of session up there."*
- A thank-you mail would be sent post the session by President HR to the 'Learning Leader' with a copy to their manager
- Group pictures were posted on the organization's social media handles acknowledging the 'Learning Leader' and the session conducted. It was highlighted in the company's newsletter as well

### **Purpose**

'Learning Leaders' now served as a two-pronged approach:

- To bring about a self-sustained culture of learning with fun/engagement
- To build a sense of community by co-owning the space (sustainability)

'Learning Leaders' was a platform through which employees could access brief learning sessions. While initially, the sessions were led by experienced or external facilitators, the space was now being led by employees themselves. This transformation came as a result of looking at the situation with an OD lens and employing some of the OD methods to make the space more inclusive.

The shift was noticeable - there was now more co-ownership of space from employees. This manifested itself in the increased participation for employee-led sessions and more volunteering

from employees to facilitate and lead the sessions. It took over a year and half for this shift to fructify. HR role was now one of:

- A guide to the facilitator, consultation on session design
- Holder of the process and structure of the program

HR now felt the need to share this experience with other branches of the organization. The primary goal was to see similar shifts in culture and climate, as experienced by the head office. This was also viewed as an opportunity to bring about fairness and balance as more training and development related work was being offered at the Head office than at the branches.

The challenge now was about how to move the program forward as the branches did not have enough information on 'Learning Leaders'.

### **The Journey Ahead**

A certain benchmark or standard had to be set for this forum at the branches. The operational workload and other priorities led to a gap in the HR personnel visiting the branches during this period. The need for an experienced facilitator was felt to diagnose and convey the needs of the branch.

### **Methods**

Consultants and external facilitators were empaneled to 'kick-off' the session at the branches. Due to the scarcity of training opportunities, the program at branches stayed bite-sized with the duration of a session being increased to 2.5 hours.

### **Challenges**

*Communication* was a huge challenge. The routine practice was to send out an email from the President, HR, detailing the program. Information on session to be held, the venue and details of the facilitator would be sent across to all employees. This email would immediately be followed by calendar invitations to the sessions providing logistical details.

The branch personnel however interpreted the mails differently. Some of the assumptions were as follows:

- The training is sales-specific because the sales staff are usually the audience for such programs
- The training is not meant for off-rolls staff, since they have not been traditionally included (the HR decided to specify that the training is open to ALL employees)
- This is a mandatory training (Since the organization does not follow a culture of mandating trainings, it was clearly communicated that the training was open to all departments leaving the choice of participation to the employees)
- Managers would not be included in this training since it is meant for all

A need to verbally communicate and include the branches in the planning process emerged soon and it was recommended by the external facilitators as well. Many times, the facilitators were coordinating with the Operations Personnel for logistical arrangements at branches, uncovering all kinds of interpretations.

‘Learning Leaders’ was a new concept towards employee development at branches. This may have come to them as a surprise since it wasn’t an area of focus earlier. There were different reactions to this change:

- The sessions should be longer/more frequent (monthly)
- Expectations were higher
- Our branch training room is too small for such an activity

***Diversity*** was another big challenge. In most branches, a hierarchical culture prevailed. The assumptions rose due to the lack of inclusiveness in the branches. ‘Learning Leaders’ was an all-inclusive space. Hence it became the task of the external facilitator to create an environment for this diversity to co-exist during the session. Learning Leaders in a sense was setting an example that such spaces can exist.

## **Processes**

- A process in which the HR would discuss with the Branch Ops and the external consultant regarding the purpose and other details of the program was defined (via a conference call).
- The senior most employee at the Branch would be requested to kick-off the session by introducing the external facilitator. This would ensure their involvement and participation.
- While planning future sessions at the branch, this individual would be informed in advance.

## **Results**

- This year, 20 'Learning Leader' sessions have taken place across 9 locations with 377 participants.
- Consecutive sessions will be planned once every quarter.
- The topics offered to branches are based on positive psychology, body work and activity-based learning.
- We have recently had two volunteers from north zone who wish to lead learning sessions.
- The sessions have mostly been well received at Branches.
- Due to communication gaps, some participants had different expectations from the sessions.
- There is co-ownership in the senior person at the branch being present at the session and the Operations person making all the logistical arrangements.
- Formal feedback is gathered in terms of a survey.
- After the session, facilitators also collect participant comments about their experience.

## **Some Reactions from Branches**

*"I am doing something like this for myself after a very long time. I thoroughly enjoyed it."*

*“Sir, we truly feel refreshed after this session. We should have this at least once a month. It is an energizing break from work. It’s great that the organization is thinking of us.”*

*“I have been in this organization for 4 months and hardly knew those who have recently joined our branch. This program created an opportunity to know my colleagues and I feel we should have more such spaces to understand each other better.”*

*“This was a great space for me to think about myself and my life. I don’t even get the time to do so outside of work.”*

The program has been conducted in the following locations so far.

<b>Zone</b>	<b>Locations</b>		
North	Delhi	Chandigarh	Noida
South	Bangalore	Chennai	Kochi
East	Kolkata		
West	Mumbai	Pune	

### **Key Learnings**

This is an iterative journey. We are continuously staying relevant to the current times, situations and making course corrections where needed.

Making programs inclusive is vital to its effectiveness and sustainability.

Appreciating the talent and skills of our employees helps amplify that positivity manifold.

### **Conclusion**

While being a forum through which employees can share their knowledge, skills and experiences with one another, the ‘Learning Leaders’ program enables individuals to learn, grow and build a sense of connectedness with each other. It is an engaging space where employees feel rejuvenated and get to know one another. With an increase in morale, there’s also a renewal of commitment to work, teams and the organization, at large.

The space embodies the diversity within the organization. It levels off hierarchies by infusing camaraderie amongst employees in different teams and at different levels.

A simple initiative can lead to significant transformation if held with authenticity of intent and co-owned with all parts of the system, in the true spirit of OD.

‘Learning Leaders’ is transforming the culture by making employees feel valued, recognized and engaged at work, whilst building a culture of learning and knowledge-sharing through-out the organization. Earlier, such initiatives would be viewed as non-productive. Managers would not be supportive of employees investing time in these. The shift is that now employees seem energized about these initiatives. It has been legitimized through official channels of communication and has displayed the continuity needed to win confidence. Managers now encourage and support employees who show initiative in conducting sessions.

This has helped us wear an appreciative lens and value our own internal resources a lot more. It is cliché to value external expertise.

‘Learning Leaders’ is inclusive as it acts as a bridge between the branches and the head office. It also brings together all the employees and creates a space for interaction (on and off-rolls).

While we started with a two-pronged approach, we ended up with many freebies. The one that’s worth mentioning here is creating a culture of inclusion within a diverse system. Ironically, all of this began by making the program inclusive and distributing power within the system to access and leverage it.

Our biggest win has been that the system feels a lot more confident about the learning offerings and is supportive in sustaining a culture of learning and development. With this foundation in place, we have contributed towards the readiness of the system in accepting more focused learning programs. Doing things, the OD way, sure seems to have demonstrated its long-term benefits.