

Challenge Accepted

Taming the Wild West Era at Western Financial

Kate Carmichael, Shannon Baradoy, and Jaclyn Wilson (left to right).
Photo courtesy of Western Financial Group, Shannon Baradoy.

Would a roadmap of your employees' intrinsic needs and motivators impact your HR strategy? Western Financial gives us a firsthand account of how partnering with The Omnia® Group has strengthened their company culture and people operations. Harnessing the power of behavioral insight, Western Financial has changed the way they select, develop and ultimately retain a winning workforce.

Their Story

Since 1905, Western Financial Group has provided diversified insurance services to over 1 million customers across Canada. With 179 locations and over 1800 team members faithfully serving their commercial and personal insurance clients, theirs is a legacy of integrity, neighborhood values and promises kept.

In many ways, their value proposition *is* value - the right coverage for the right client. It all starts with a conversation between neighbors about things like honesty and accountability, trust and loyalty.



truthfulness

VALUE

fairness

loyalty

Their People

To their customers, and within Western, truthfulness, fairness, value and loyalty are more than just words carefully placed in marketing materials and commercials. They are the guiding principles you'd want from a good friend and neighbor. These principles guide the writing of every policy, of every voice answering a customer service call and every customer visit made by someone who genuinely cares. These ideals are part of how Western communicates with their customers and with each other – team member to team member.

Investing in employee development is a cultural hallmark at Western Financial Group. Their approach towards career development through coaching emphasizes positive psychology and the belief that their team members are the best and brightest in the industry. Accordingly, they motivate them through reward and recognition of their contributions. As part of a performance-driven meritocracy, it is not unusual to see Western employees venture to improve their work and workplace.

Their Growth

From its inception, aggressive but scalable growth has driven The Western Financial Group. They acquired Coast Capital Insurance Services Ltd in July of 2013 and added 29 locations. In 2018, they acquired Ontario's Axion Insurance Services Inc. Western's most recent acquisition further expanded their already formidable broker network and allowed them to grow beyond western Canada.

Their Challenge

Among the challenges on the docket of an organization managing several recent M&A's (besides branding, marketing and IT) was the people quotient. It fell on the People & Culture Department to tackle the most vexing challenge to scalable growth that the organization had yet faced: finding and developing the right people. The insurance industry in Canada is, as a whole, experiencing a scarcity of new talent. All too commonly, the onus falls solely on the employer to educate and certify new recruits. Nationally, knowledgeable and experienced people are leaving the industry in greater numbers largely through retirement of an aging workforce.

Even as the organization added new team members through strategic acquisitions, the influx demanded a search for solutions that would manage that growth in a way that remained faithful to their guiding principles. New faces joined the executive team and brought their own experience with other recruitment tools including psychometric evaluations for talent acquisition and development.

Among the many services used by those new acquisitions was The Omnia Group.



Without change, there can be no growth. And scalable growth through training and development were goals Lisa Osachoff, SVP of People & Culture, set from the start. Lisa began her career with Western in 2012. She set out to establish recruitment, selection, placement and development solutions to bring together a scattershot process. “Omnia was used ad hoc at some locations and every location that did use it, used it differently.” She recalls it as a “choose your own adventure” approach. Literary references aside, she knew consistency was imperative. And though there were options brought to the table to compete with Omnia, Lisa and the executive team decided to let their guiding principles guide the decision-making process and she stayed with Omnia. One of those principles is “value.” Moreover, she felt that Omnia had not been utilized to its full potential. Believing they had a winner, the Recruitment Department took ownership and sought buy-in from the rest of the organization.

Their Team

Shannon Baradoy, Western’s Recruitment Manager, leads the Recruitment Department with two Recruitment Consultants (“RCs”) as a specialized team within the People & Culture Department. The RCs, Jaclyn and Kate, are very hands-on and partner with hiring managers in the field. Shannon oversees the full-cycle of recruitment from advertising, phone screens and placement to the requisition support and training. A tight-knit group, their department tag line is “Hire Hard. Manage Easy.”

Shannon feels that her personal hiring experience helped her instantly see the value of Omnia and that Lisa’s mentoring was instrumental in her successful onboarding and development. With Shannon, Jaclyn and Kate’s leadership and expertise, Western management has strategic allies to meet staffing and development challenges.

Shannon notes that there is an equation that helps describe their overarching philosophy. It is simply: Quality + Service = Value. This is “Top of Mind”-thinking. “By helping our Hiring Managers build their recruiting skills, they impact the organization and showcase our guiding principles to candidates and customers alike.”

It is her way of describing the guiding principles in action. In practice, she sees her job as largely “... helping managers feel more supported... (to) help them build their skill set.”

A self-confessed product advocate, Shannon isn’t shy about calling herself an “Omnia Geek.” And, she has found that Omnia’s rich knowledge base provides her with the motivation to relish the title. She

“Prior to 2012, the metrics and reporting related to people within the organization was limited. We sometimes describe this time at Western as the Wild West.”

~Lisa Osachoff



“By helping our hiring managers build their recruiting skills, they impact the organization and showcase our guiding principles to candidates and customers alike.”

~Shannon Baradoy

enthusiastically promotes the power of Omnia solutions because of its alignment with Western’s values. As to impact, Shannon highlights Omnia’s importance at management coaching sessions and training events as critical tools in a more extensive process.

Their Recruitment Process

Omnia was formally built into Western’s recruitment process in 2013, a time of frenetic activity. The Recruitment Department’s mission-critical challenge – find, coach and develop the right people. They designed and implemented a methodical process:

- Phone screen
- If applicant rates highly enough for a tentative recommendation, the Recruitment Department administers an Omnia assessment
- Formal, personal interview
- Hiring Managers use the Omnia report to tailor their interview questions for each individual candidate

After building their process around Omnia, they ensured that hiring managers had a “deep understanding” of it. To supplement that learning, they scheduled Omnia webinars for management training early and often. Learning transfer of Omnia skills proved successful and sustainable. Western’s management coaches with, and to, those skills every day.

They’ve applied Omnia and integrated it into:

- Team meetings as a developmental tool
- Western’s corporate interview guide questions to execute a more complete assessment of applicant responses
- A comparison of hiring managers’ Omnia results with applicants *(and existing employees)* a.k.a. “Omnia’s”

Shannon and her team now pose and discuss questions that include “What did you agree with about your own Omnia?” or “What don’t you agree with about your own Omnia?” to gather supplementary data for special and continuing projects, such as:

- A strategic overhaul of recruitment and training processes at a call center
- Implementation of a leadership development program at senior management levels
- Coaching up a sales associate to meet and exceed their quarterly goals



Omnia provides perspective and reason, an opportunity to avoid binary decision making that leads to hiring decisions with unfavorable outcomes. As an example, a candidate interviewing for an external sales position with a tall column 2 (caution) on an Omnia Report as opposed to a tall column 1 (assertiveness) may not necessarily be a hard “no” hiring decision in Western’s view, but rather an example of a person who requires a more nuanced approach to coaching and mentoring, post-hire. If their column 2 shows risk aversion, they could find where that risk aversion resides and how it can be coached for success.

In management development sessions, Shannon stresses that while Omnia is an integral part of the hiring process, Omnia is NOT a final decision-making tool in and of itself. Instead, it is a powerful tool that is part of a well-organized process. She notes that one of Omnia’s key deliverables is that it gives you a “common language” to communicate with a candidate and provides a productive and relatable context in which to ground that conversation. In that respect, she says, the “(Omnia) Target is a guide” in that the Target ranges are a “...yardstick; it gives us that common baseline across the entire company for higher-level strategy for a hiring base.”

Shannon feels that “it (Omnia) brings credibility to the Recruitment Team.” She cites Omnia’s support for the Recruitment Team as their embedded subject matter experts has “impacted our brand.” She also sees “continuous adoption” as being a Western interdepartmental relationship norm. And that continuous coaching is “continuous progress.”

Their Solution

The Recruitment Team feels the Omnia offers key features that include:

- A straightforward, easy candidate experience
- A client portal offering a superior user experience
- Fit for their envisioned process
- Concise reporting
- Cost effectiveness
- Comprehensive analysis
- Ease of implementation
- Track record in the insurance industry
- Library of profiles for improved benchmarking
(Example: Western’s Account Executive profile and Omnia’s are almost identical!)

On the operational side, Lisa and Shannon appreciate the versatility in options Omnia provides. The “Profile” and “Target” solutions present a depth in benchmarking that their competitors do not. They want a solution that is aided, easy to use, and fits into their process. Omnia solutions are customizable. With an organization in flux and with different hiring challenges on a unit-to-unit level, the flexibility to advise local hiring managers to use their tools for their individual needs was, and is, the perfect fit for their



Shannon Baradoy
Recruitment Manager

*Photo courtesy of
Western Financial Group*



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~Shannon Baradoy

overarching organizational needs. Lisa and the executive team choose Omnia as a strategic partner for their shared vision.

Additionally, they find that the Omnia Assessment succeeds at identifying people with the right behaviors for their industry positions - people who are motivated by the type of personal fulfillment that helps people build successful relationships in the insurance business. The resulting, robust conversations between management and their teams ultimately increase synergy.

A good foundation is essential to any organizational rollout. And if the culture is embedded in that foundation, the possibility of buy-in becomes genuinely enthusiastic buy-in. The Omnia plan was rolled out at regional meetings as the cornerstone of their People & Culture plans at two critical moments, one in 2015, and the other in 2017. In 2015, Lisa convened a Leadership Conference and made sure that every “people leader” completed an Omnia Leadership Report. What these people leaders found was that their own Leadership Reports provided them with insight into their leadership styles and tendencies. It was “next level” coaching for the entire organization. It helped them answer the question “Who are our leaders?”

Their plan was implemented in two parts:

Part 1 - An overview of Omnia

Part 2 - Explanation and exploration of on-boarding possibilities within regions on regular conference calls. The idea was to take Omnia Leadership Reports, cross-referenced with existing management Omnia Profiles and apply them to their employees. The challenge then became “Can you apply this data to your team and their goals?”

Their Results

Omnia solutions are well-received in the field. The People & Culture Department has expanded its scope and reach with Omnia and uses it in a training & development capacity by promoting it to managers in the field. This ambitious project only began to take shape in September of 2017 when the Recruitment Department held breakout sessions with hiring managers that reinforced those ideas and helped put them into action through interactive training sessions.

Over time, Western’s use of Omnia has evolved. What began as the first step of what would become an efficient recruitment process, has now become a well-oiled machine and an indispensable part of how Western Financial’s hiring managers do business. Through quality control surveys distributed to hiring managers, and other forms of solicited feedback on webinars and other training events, executive leadership has received enthusiastic responses to Omnia’s viability as a hiring tool. To Lisa, Shannon, Jaclyn, and Kate, their hiring managers’ “Aha” moments are their own reward.



Often, a simple success story is the best illustration of a successfully implemented multi-level rollout. Take the case of “Tina,” who works in Sales and was experiencing challenges acclimating to her manager’s activity standards and sales goals. Tina had been with the team for a year and a half, but after only a month with her sales manager, Tina wasn’t meeting her goals. She was finding it challenging to communicate with her manager. She dreaded her sales coaching calls and generally seemed to be on a course to fail.

Her sales manager was “at her wit’s end” but was not ready to terminate. It wasn’t consistent with her leadership style to just give up on someone. It seemed they were talking past each other, that they did not understand each other in any professional interaction.

Shannon revisited the sales manager’s and Tina’s Omnia results. While her manager was fast-paced, informal and a big picture thinker, Tina was more analytical, concrete and measured. Her manager realized that a structured coaching process could improve performance. In the past, when her sales manager would reach out to Tina to help, Tina would receive her messages as anxiety-inducing and negative. A door to more effective communication was opened and it made a difference. She saw an IMMEDIATE increase in her numbers and Tina met her sales goals. The Omnia is a tool they use to “do the translations” when they need to facilitate that conversation and help their people learn, grow and succeed. “The endgame is always to help team members succeed, and I always exhaust every avenue I have before taking a final act of termination,” Tina’s manager asserted.

Today, Tina is excited about her next “one-on-one” meeting with her manager, her next policy sold and her next “everything” to brag about her accomplishments just a little. It is a classic turnaround story of a talented employee whose natural strengths could be better developed by finding a new approach.

“The endgame is always to help team members succeed, and I always exhaust every avenue I have before taking a final act of termination.”

~Tina’s manager



There is No Substitute for Good Service

Whenever Western Financial Group needs an assist, Omnia is always available for guidance. Even when Western's needs require customizable solutions, Omnia's Client Service Team always takes the time to understand requirements and develop solutions that work. Omnia's Client Service also includes unconditional support on reports. They explain results and help to interpret those results. They listen and provide suggestions to help Western accomplish what they want to accomplish. Shannon and her team know from their industry that service is the ultimate intangible quality and that in that regard, Western and Omnia are a perfect match. Accountability is paramount at Western. And the organization places a strong emphasis on continuous improvement of the client experience through superior service. So does Omnia. Opposites may attract, but lasting partnerships are built on a shared vision.

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Photo courtesy of Western Financial Group



A History of Putting People First

At Omnia, we've always believed that an organization's most valuable asset is its people. We were one of the first to lay the foundation for behavioral analysis in the workplace over 30 years ago. Today, we're continuing to evolve to ensure our partners continue to develop efficient and effective teams in the modern workplace.

Our simple assessment, tailored reports, and dedicated coaching capabilities empower HR and business leaders to continuously grow, develop, and inspire their workforce. This goes far beyond the hire—we're a reliable and accessible partner throughout all stages of the employee lifecycle.

Each company has its own unique culture and business goals, and we know productive, motivated talent can make those goals achievable.



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