



ACCC Leadership Development Needs Analysis & Curriculum Recommendation

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ACKNOWLEDGEMENT

This report is the result of a unique collaboration among the Learning & Development Department and the Leadership Development Program Champion Committee. Each member contributed their time, thoughts, and experience to the development of the ACCC Leadership Survey and ACCC Leader Interview. Additionally, this committee will continue to advocate, promote, and support the ACCC Leadership Development Program into the next phases of development.

At the time that this report was created, the Leadership Development Program Champion Committee consisted of employees of varying roles and departments within the company:

Alek Nedelkovski | Instructional Designer, Learning & Development Department

Gabriela Castro | Underwriting Management Developer, Underwriting Department

Isabel Macik | Executive Assistant, Office of the President

Jennifer Garza | Sr. Human Resource Manager, Human Resource Department

Karen DePaul | Internal Audit Manager, Claims Department

Maria Moreno | LMS Administrator, Learning & Development Department

Tasha Bennett | L&D Training Supervisor, Learning & Development Department

Todd Juneau | Instructional Designer, Learning & Development Department

INTRODUCTION & PURPOSE

ACCC Insurance Company executives have been rolling out the company's Mission, Vision and Values for the last four months to provide the strategic objectives and communicate the future direction of ACCC. These roundtable sessions led to the request of creating the Leadership Development Program (LDP). The purpose of the LDP is to provide clear leadership expectations, develop technical and soft skills, and to provide the training needed to align leaders with the mission and supporting principles. With a Leadership Development Program Champion Committee (LDPCC), the development of the Leadership Development Program began with a needs assessment. This document summarizes the findings from the needs assessment and the recommended design.

Overview

After a brief history of the project, the methodology used, key findings, strengths & weaknesses, needs, and recommendations will be provided.

In the course of conducting our needs assessment, we mainly spoke to the sponsors, Jack Ikenaga Jr. and Lisa Chapa, and surveyed all stakeholders. In addition, we drew on the input of leaders collected in one on one interviews. Our goal was to gather as much information as possible regarding the required leadership capabilities for ACCC's success.

It is clear from the data that we will need to establish a consistent leadership program for all levels of leadership. It is also clear that performance management and behavior management based trainings are needed to move the entire leadership team closer to the ACCC strategic objectives.

PROJECT BACKGROUND

- ACCC Insurance Company President, Jack Ikenaga Jr., and VP of Marketing/Underwriting Director, Lisa Chapa, called on the Learning & Development Department to review the current leadership training needs. They requested specific topics be included in the program along with supporting materials.
- The Learning & Development Department formed a Leadership Development Program Champion Committee (LDPCC).
- The LDPCC distributed the Leadership Survey to 95 leaders. Approximately 1,700 answers were collected about current leadership capabilities, weaknesses and strengths. Also, 27 in person leader interviews were conducted to further analyze the needs of the ACCC leadership team.
- From the survey and interviews prevailing themes arose and created our base for the work to come. Subsequently a second LDPCC meeting was called to review the results, examine the prevailing themes, and incorporate the President and VP's required content in the design of the LDP. In this meeting, value added ideas were sought through brainstorming, promoting ACCC's values and focusing on the program objectives.

METHODOLOGY

ACCC's Learning & Development Department conducted a needs assessment to gain a better understanding of the technical and soft skills that leaders (Supervisors, Managers, Directors, and Executives) need in order to be successful in their role. Given concerns about confidentiality, the need for representation at each level, and the various locations of ACCC's leadership, the first phase of the needs assessment was conducted via an online survey. In an effort to ensure that there was representation from each department, 27 stakeholders were interviewed during the second phase of assessment.

The needs assessment was conducted over an eleven day period. The issues touched upon in the surveys and interviews are complex, and as with any assessment, additional time and resources would allow for a larger scope and depth of analysis. Despite these limitations, this assessment collected a significant amount of information. The analysis has identified patterns and themes that support the initial inferences of the authors, as well as revealed additional needs of ACCC's leadership. The major steps of the project can be categorized as: 1) identify what needs to be known, 2) create the questionnaires for the surveys and interviews, 3) identify leaders to participate, 4) gather data, 5) organize and interpret data, 6) write and revise draft report, and 7) provide final report.

Identify What Needs to be Known

The authors along with the LDPCC discussed the goals of the needs assessment. The assessment should identify:

- Soft and technical skills needed in order for leaders to succeed in their role.
- Priority topics to cover during a leadership program.
- Priority organizational and leadership capabilities as they relate to ACCC's success; and if they align to those provided by ACCC's CEO.

Create the Questionnaires for the Surveys and Interviews

The authors collaborated with the LDPCC to generate the questions to be asked during the surveys and interviews. The survey and interview questions are listed in the appendix of this report.

Survey Questions

The survey questions addressed:

- ACCC's ability to manage resources to effectively gain an advantage over our competitors.
- Characteristics of ACCC's current leadership and their ability to manage resources to effectively gain an advantage over our competitors.
- Organizational and Leadership Capabilities that are most critical to ensure ACCC's success over the next few years.
- Leadership development challenges.
- Strengths and weaknesses of ACCC.
- Critical barriers to be addressed to achieve ACCC's vision and execute leadership strategies.

Interview Questions

The interview questions addressed:

- Top three priorities for leadership training and development this year.
- Improvements that can be made to the way leadership training is delivered.
- The exposure that leaders have to the leadership courses available now.
- Challenges that leaders face that could be resolved with training.
- How to make leadership courses and workshops more accessible.
- Desired topics in a leadership program.
- Current types of team analysis being conducted by leaders.
- How leaders currently manage performance and development of their direct reports.

Identify Leaders to Participate

The goal of the survey was gain responses from leaders in all departments and at all levels (Supervisors, Managers, Directors, and ET members). The goal of the leadership interviews was to strategically allow leaders who normally aren't heard to have a voice. Each department at ACCC was represented within the interviews; ranging from supervisor to ET level leaders.

Gather Data

The Learning & Development Department gathered data for a period of eleven days. During the first phase, the ACCC Leadership Survey was sent out to 95 leaders via an emailed hyperlink that would take the participants to the survey housed on SurveyMonkey.com. The survey took an average of 54 minutes to complete. During the second phase, six members from the Learning & Development Department scheduled and conducted interviews with 27 leaders. The interviews took an average of one hour and were typically conducted by phone (for participants outside of Houston), in the office of those being interviewed, or in a small conference room.

Organize and Interpret Data

To conduct an analysis of the survey and interview data, a tiered process was used.

- SurveyMonkey.com served as a great tool to collect and organize the raw data captured from the participants' responses to each question. For questions that required participants to make a selection from a set list of answers, this raw data was captured automatically. In instances where a participant was required to fill out a comment box, each individual response was reviewed and categorized into groups based on a stated topic.
- Members of the Learning & Development Department who conducted leadership interviews reviewed the responses of the leader's that had been assigned to them. Based on this review they then summarized their findings. Summaries acknowledged prominent themes that were constant among interviewees, blatant differences, and recommendations to address issues.
- After the six summaries were completed, the authors were able to analyze the summaries to create insight statements from the themes. Once the insight statements were created, the authors went back through the interview data to be sure that nothing essential was missed.
- The findings from the surveys and interviews were then presented to the LDPCC.

Author and Revise Draft Report

The authors wrote first drafts of the different sections of this report, which were then combined into a coherent first draft. Following the production of the first draft, the authors provided their findings to

the LDPCC for feedback and amending. This larger group made suggestions for clarifications, additions, and changes.

Provide Final Report

The final step, providing the final report, begins with the dissemination of this report to key sponsors and all stakeholders of the ACCC Leadership Development Program. This report is meant to create collaborative discussions toward establishing a framework and foundation to begin building the ACCC Leadership Development Program.

METHODOLOGY: ADVANTAGES AND DISADVANTAGES

Advantages

- The ability to distribute the survey to all leaders in each ACCC location.
- Being one of the easiest and least expensive ways to systematically assess needs.
- Creating an opportunity to establish rapport and trust with current leaders and thus obtain the insiders' views and depth of information.
- Permitting input from many individuals with different perspectives on the needs of leadership.
- Increasing awareness within leadership of the creation of the ACCC Leadership Development Program; this may result in those interviewed being engaged in the larger project.

Disadvantages

- The surveys were not completed in a controlled environment. This could have impacted the participants' concentration if they were interrupted by other tasks, emails, employees, etc.
- Both the survey and interviews gave considerable weight to the knowledge and viewpoint of current leaders. There was no way to determine if leaders communicated their full and honest opinions.
- The surveys and interviews did not directly assess the needs of the employees who are affected by their leaders' soft and technical skills.

KEY FINDINGS

Organizational Capabilities

The first section of the ACCC Leadership Survey focused on the organizational capabilities that participants noted as most critical to ACCC's success in the next few years. In terms of the organizational culture, participants indicated that it is most critical for the organization to have leaders with a strong business acumen, leaders at all levels, and leaders who "walk the talk" by living the values. Participants believe that it is critical for the organization have a clear understanding of the vision and strategies, with goals and resources that align with the vision and strategies. There should be a focus on doing what's right for the overall organization. Mindsets should be customer focused, embrace

collaboration and teamwork, and be people oriented. Each department should be structured to hold leaders and staff accountable through department metrics, KPIs, and clear expectations. The ability to identify high performing team members is also critical to ACCC's success. When survey participants were given the opportunity to speak on other organizational capabilities that were not outlined in the survey questions, the most frequent responses conveyed the need of increased communication, training and accountability. Some of the sample quotes from participants:

"Effective and continuous training. Training should not simply be limited to onboarding. Communication and delivery is also an area that requires much improvement. It is not effective to have miscommunications. If miscommunications are identified, management should focus on finding the core issues and determining a resolution without dismissing employees' key concerns. Everyone is accountable for doing their work effectively. Inclusiveness for everyone, and not being selective. Everyone should have an opportunity to be successful and given a fair opportunity. Performance metrics are not accurate if there are inconsistencies and inaccuracies being learned by employees from training down to supervisor/manager levels. Learning, understanding, and communicating needs to be a priority at all position levels. Analyzing competencies and skill sets of employees is important to keep employees engaged and motivated."

And another participant stated:

"Establishing clear MVV provided each employee the goals and direction of the organization - this was the most needed capability (providing direction). In addition, being performance oriented (establishing clear performance metrics) will enable leaders to ensure staff reaches expected performance metrics (also taking care of our customer and growing the business)."

Leadership Capabilities

The second section of the ACCC Leadership Survey focused on the leadership capabilities that participants noted as most critical to ACCC's success in the next few years. In terms of industry knowledge, participants believed that it is critical for leaders to understand customers, the total business, and the legal/regulatory issues and requirements of the industry. In terms of management knowledge, it is critical that leaders know how to conduct a team analysis and identify improvement, train their staff, and measure and assure performance improvement. Leaders must know and understand department metrics, have strong problem solving and critical thinking skills, and be able to develop effective strategies. Leaders must create an environment that retains the best talent, motivates people, and serves as a model of our values. Employees need to be treated with respect and dignity. Leaders need to set clear goals and priorities; creating accountability for performance results. When survey participants were given the opportunity to speak on other organizational capabilities that were not outlined in the survey questions, the most frequent responses conveyed the need for better communication, training and development, and trust. One of the sample quotes from participants:

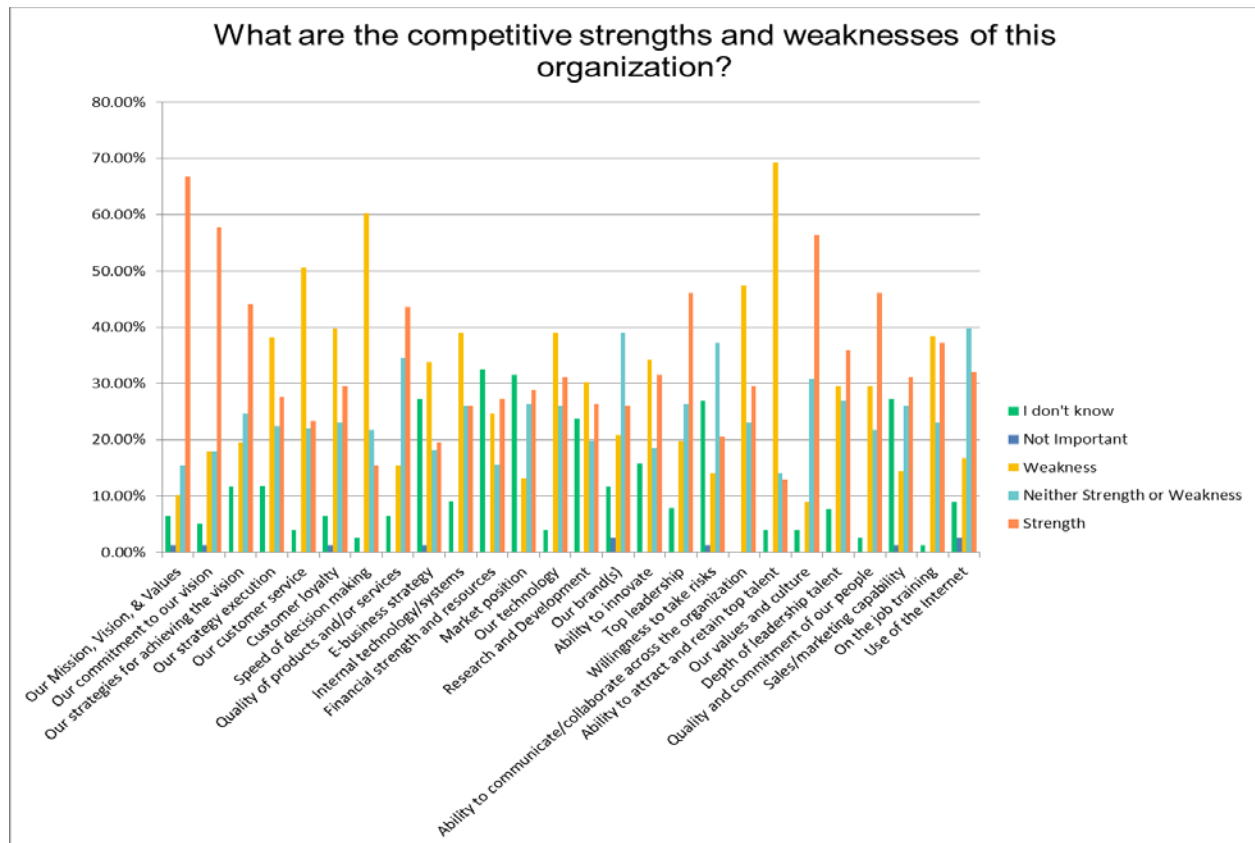
"Setting the example. It is important for leaders to not only speak and communicate expectations, but also follow them. When there is a gap between what is said and what is done, employee morale and trust diminishes. Feedback is necessary and important. It is easy to miss important areas of opportunity, and stay accountable at all levels...if feedback is not reviewed and accepted..."

STRENGTHS & WEAKNESSES

During the leadership survey, the participants were asked “*What are the competitive strengths and weaknesses of this organization?*” Participants were asked to rate the topics below as *Not Important*, *Weakness*, *Neither Strength or Weakness*, or *Strength*. Additionally, if a participant didn’t understand what was meant by the topic, they were able to opt out by selecting *I don’t know*.

- Our Mission, Vision, & Values.
- Our commitment to our vision.
- Our strategies for achieving the vision.
- Our strategy execution.
- Our customer service.
- Customer loyalty.
- Speed of decision making.
- Quality of products and/or services.
- E-business strategy.
- Internal technology/systems.
- Financial strength and resources.
- Market position.
- Our technology.
- Research and Development.
- Our brand(s).
- Ability to innovate.
- Top leadership.
- Willingness to take risks.
- Ability to communicate/collaborate across the organization.
- Ability to attract and retain top talent.
- Our values and culture.
- Depth of leadership talent.
- Quality and commitment of our people.
- Sales/marketing capability.
- On the job training.

A graphical representation of the participants’ responses is provided on the following page.



(A larger version of this graph is located in Appendix C)

Participants collectively shared a variety of competitive strengths of ACCC. The most frequently selected strengths included our mission, vision, & values, our commitment to our vision, our values and culture, quality and commitment of our people, and top leadership.

The most frequently selected weaknesses included our ability to attract and retain top talent, our speed in decision making, our customer service, our ability to communicate/collaborate across the organization and our customer loyalty.

Outside of the leadership survey, leaders who participated in the leadership interviews echoed these findings. Communication was a standout topic that was viewed as a weakness. Communication was mentioned in multiple facets; handling sensitive subjects, discipline, communicating with an executive level leader were frequently mentioned. Additionally, accountability and the lack of department metrics/KPIs/clear expectations for leadership was a recurring message as well.

NEEDS ANALYSIS

In an attempt to better understand the needs of ACCC's leaders, several questions from the Leadership Interviews were tailored to determine what was desired out of a leadership development program. The particular questions that addressed what is needed included the following:

- If you could choose, what would be your top three priority topics for leadership training and development this year?
- What improvements can we make to the way we deliver our trainings for leadership?
- What are some of the barriers you face when it comes to participating in our training programs?
- What challenges do you face that could be resolved with training?
- Is there a way we can make the courses and workshops we offer more accessible to you?
- What topics would you want to see covered in a leadership development program to make it valuable for Supervisors?
- What approaches to learning do you believe would be most effective?

Most of the responses from the leaders interviewed could be easily grouped into themes: communication skills, performance and accountability, and preferred delivery of training. Many of these themes have threads that weave together.

Communication Skills

One of the most prominent themes that was observed in the survey data as well as the interviews, was a need for leadership courses that focus on developing and improving communication skills. Leaders indicated that there was a need for training on communication in multiple areas:

- Interpersonal Skills (effective communication techniques).
- Speaking Confidently & Public Speaking.
- Cross Departmental Communication.
- Vertical Communication (appropriately speaking with a superior, dissecting directives into actionable objectives, probing to understand expectations, etc.).
- Horizontal Communication (seeking and providing peer feedback).
- Having difficult or sensitive conversations with direct reports.
- Retention Conversations (how to retain an employee who wants to quit).

Performance & Accountability Expectations

Another prominent theme observed during the collection of survey and interview data was the need for clear performance and accountability expectations. The majority of leaders that participated in the leadership interviews indicated that they were not aware of any company-wide KPIs for their role. Commonly, leaders thought they were evaluated based on the performance of their team, but there was no metrics or performance assessments that were reviewed with them. There also seemed to be a blurred line as to what was expected at each level (Supervisor, Manager, Director, and Executive). This also was conveyed by the majority of participants.

Preferred Delivery of Training

The overall consensus from leaders participating in the interviews was that online learnings had limited effectiveness and content could be more effectively delivered in a classroom setting. However, it was

acknowledged that online content can be used for remediation or trainings on simple processes. Leaders stated that the following characteristics should be present in an ideal leadership class:

- Small-to-medium sized classes.
- Hands on, with the opportunity to role-play and practice content that was dynamic or complex.
- Mixture of leadership from different locations, departments, and levels (depending on content).
- Some courses are mandatory for each leadership level.
- Ongoing classes (an established frequency of how often each course must be taken).

RECOMMENDATIONS

Our recommendation is to require all current members of leadership (Supervisors, Managers, Directors and Executives) to complete all courses in the core curriculum of the ACCC Leadership Development Program. Based on the discovered needs, leaders at all levels need to have an equal baseline of what is expected from them. The initial launch of the ACCC Leadership Development Program will create the foundation for all leaders to be on the same page; creating a consistent management culture, regardless of job title or department.

Prior to the kickoff of the LDP, we will request that all ACCC department heads map out their anticipated hiring schedules for new leaders (at all levels) between October 2018 and December 2019. This would allow us to anticipate the need to create a second track for new leaders who are externally hired into leader roles or for employees that are promoted into a Supervisor role. In order to encourage a consistent management culture, it would be ideal that new leaders complete the courses as outlined in the curriculum.

The Leadership Development Program curriculum will be housed and managed through the Virtual Campus. As a leader moves forward through the program, their manager will be required to monitor the leader's success and progression in the program. The curriculum will possess a blending learning environment: Instructor Led Trainings (ILT), Virtual Instructor Led Trainings (vILT), and Web Based eLearnings (WEB).

All courses that have ILT or vILT portions will provide the presentation of the concept, application of the concept (in-class practice and roleplay), and tools that the leader will take with them for their accountability. In ILT or vILT classes, leaders will be tested and scored on their abilities to successfully demonstrate/roleplay the concept. These scores will also be tracked in the Virtual Campus. We will provide additional recommendations for how each leaders' manager can be held accountable as well.

The curriculum will be divided into the following concentrations:

- Leadership Team Building (LTB).
- Understanding Your Responsibilities and Expected Competencies (URE).
- Managing Yourself (MYF).
- Managing Others (MOS).
- Managing Your Team's Performance (MPE).

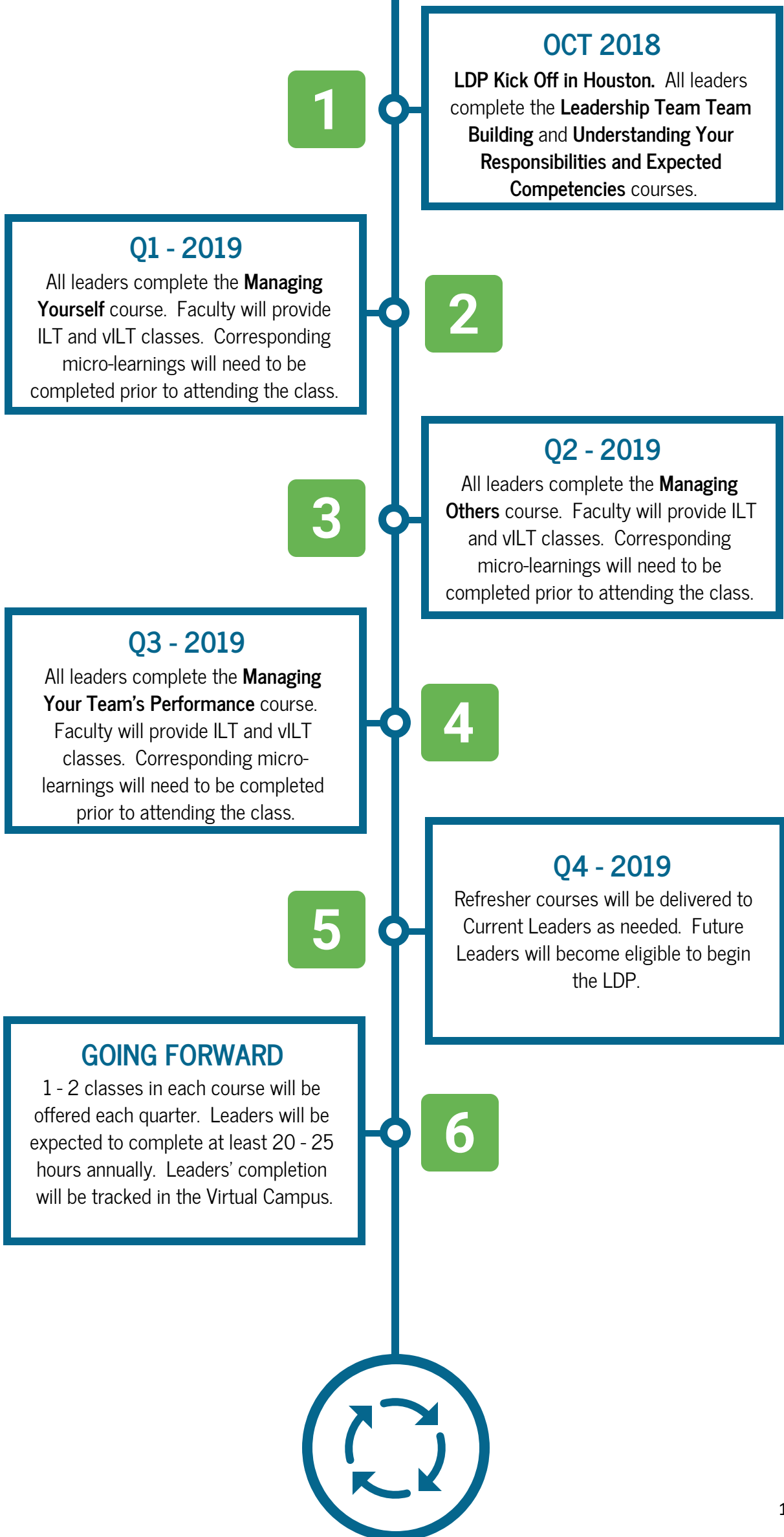
All Human Resource classes are followed by (HR). Leaders will be required to complete these classes once annually regardless of of tenure or leadership level. Class names followed by an asterisk (*) are elective classes. These classes are not part of the core curriculum.

The following pages will provide the program schedule and courses that all leaders are expected to complete during the first year of the program.

ACCC
INSURANCE COMPANY

Leadership Development Program

The 1st Year



Leadership Team Building (LTB)

(Total team building: Tactics for working better together)

Course Overview:

Highly effective teams usually produce first rate results. High-performing teams exhibit accountability, purpose, cohesiveness, and collaboration. The ACCC leadership team will join forces by participating in an active team-building training. This training will help the ACCC leadership recognize their common purpose, align their approach to achieve ACCC goals, and build mutual trust among members of the leadership team.

Enabling Objectives:

The leadership team will understand ACCC's organizational vision and each other, set aside their individual views, and understand they are responsible for the achievement of ACCC, not just their individual team.

Competencies:

Drives vision and purpose, collaborates, interpersonal savvy, communicates effectively, values differences, manages conflict, instills trust.

Supporting Value:

Teamwork Divides the Task and Multiplies the Success

Delivery Method:

Blended

Length of Time:

6.5 hours

Classes and Learner Activities:

LTB101: Joining Forces: What Makes a Team

This is a general discussion of what makes a great team. What great teams look like, how they act, problems they often encounter, and dysfunctional behavior that can sabotage a team. We will discuss the characteristics of a successful team and identify the ACCC leadership team's strengths, opportunities, and dynamics. You will identify how your individual contributions impact the ACCC leadership team.

LTB102: Understanding Different Communication Styles

Highly effective teams communicate. Effective communication can breed trust. During this class you will identify your individual behavior style and those of your teammates in order to adjust for better communication.

LTB103: Difficult Personalities and Difficult Situations

Ways to deal effectively with difficult personalities, dysfunction, and tough situations. From "negaholics" to backstabbers and whiners to minimal contributors, you will learn better

ways in which to communicate and manage relationships with those whose actions make “teaming” hard.

LTB104: Team-Building Survival Skills

During this activity you will work together with other leaders to solve a problem. You will work on your negotiation and listening skills. You will understand the importance of every team member, and that a group effort can lead to a better conclusion than choices made alone. You will learn to value the different behavioral styles of the leaders on your team. You will also learn to listen, ask better questions, and choose your words carefully for better communication and deal with a challenge as a team.

Understanding Your Responsibilities and Expected Competencies (URE)

(Holding yourself and others accountable to meet expectations)

Course Overview:

This will be a review and training of ACCC Leadership expectations, responsibilities and competencies.

Enabling Objectives:

ACCC Leadership will understand and begin to immediately apply their general leadership expectations at a rate of 100%. The necessary competencies to achieve expectations will also be communicated. If a leader is lacking a competency, they will put a development plan in place to improve in the lower skilled competency.

Competencies:

Accountability, drives results, plans and aligns, action oriented, customer focused, develops talent, drives engagement.

Supporting Value(s):

Our Customers Are Why We Exist
Teamwork Divides the Task and Multiplies the Success
No Shortcut to Greatness
Every Claim is Mission Critical
Our Agents' Success is Our Success

Delivery Method:

Blended

Length of Time:

6.5 hours

Classes and Learner Activities:

URE101: ACCC Leader Required Competencies

During this class you will gain an understanding of the required competencies needed to effectively accomplish the ACCC Leadership expectations. In this class we will use the Korn Ferry Leadership Architect™ to focus on skills that matter most for performance, skills that are relevant to a current workforce, skills that are ACCC Mission, Vision and Values driven and can be used for multiple purposes such as development, performance and retention. Competencies we will focus on: Accountability, Action oriented, Strategic mindset, Collaborates, Attracts top talent, Develops Talent, Communicate Effectively, Drives the Vision, Instills trust and Manages ambiguity. Participants will identify their lower skilled competencies, understand the cause of the lower skill and how to develop the competency.

URE102: Expectation – Performance Management/Driving Results

As an ACCC leader you must be willing to drive results. Driving results is a mindset that infuses a team with a sense of urgency and eagerness to provide excellent service for the customer. Performance management/Driving results is an ACCC Leadership Expectation. As leaders, we must *Monitor ACCC Accountability Metrics to Drive, Recognize, and Reward Positive Performance*

and Behaviors. Strong ACCC performance is always top of mind. In this class, the following ACCC Leadership Performance Management expectations will be communicated: Analyze for Performance, Employee 1:1's, Team Meetings, Side by Sides/Observations, Monthly Report Submissions, Develop Employees, Employee Mid-Year Reviews, and Employee Annual Reviews. Leaders will learn how these expectations drive results and ACCC's MVVs. During this class, tools and checklists will be provided to support the expectations, hold yourself accountable, and hold others accountable.

URE103: Expectation – Successfully Onboard New Employees (HR)

Retaining talent is part of ACCC's Mission, Vision, and Values, found in the mission supporting principle *Teamwork Divides the Task and Multiplies the Success*. In this class, you will be introduced to the Onboarding Program and expectations regarding the onboarding plan will be communicated. You will practice pieces of the 30/60/90 day progression process in the class.

Managing Yourself (MYF)

(Drive results by managing your knowledge, resources, and time)

Course Overview:

Self-management skills include: self-confidence, persistence, resilience, patience, perceptiveness, and emotional regulation. These skills will allow ACCC leaders to strive for their goals, perform at work, and contribute to a healthy work environment for themselves and their co-workers. This training will explore each of these skills to help ACCC leadership fully understand how they are helpful in the workplace.

Enabling Objectives:

The leadership team will be able to understand how effectively managing their time, resources, and professional development will contribute to the success of themselves, their employees, and ACCC.

Competencies:

Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.

Supporting Value(s):

Teamwork Divides the Task and Multiplies the Success

Our Customers Are Why We Exist

Every Claim is Mission Critical

No Shortcut to Greatness

Delivery Method:

Blended

Length of Time:

12 hours

Classes and Learner Activities:

MYF101: Be an Expert in Your Field

This course will focus on key exposures that you should receive in order to gain expert knowledge in your field. After successful completion of this course, you will have an outline to follow that will provide you with a step by step guide on your individual and team metrics, department goals, and how they fit into the Mission, Vision, and Values of ACCC.

MYF102: How to Build an Effective Team

This course will provide you with the tools to be able to create a team environment that empowers and engages ACCC employees. *Every Employee is Valued and Makes a Contribution.* Each team at ACCC should provide employees with an atmosphere that encourages the sharing of thoughts, strategies, and tips; helping to uncover the idea that moves the needle.

MYF103: Professional Development*

This will be an interactive workshop where you will work with other leaders on a team to solve real-world departmental problems. The team will present their action plan to resolve the problem to the attendees of this workshop.

MYF104: Leadership – 3 Routes to Good Communication

This course will focus on the tools and methods you are able to use to create better conditions for communication. This course will allow you to be on the same wavelength as the person you are talking to, listen effectively, and convey your ideas clearly. After taking this course you will learn three essential tools for effective communication: non-verbal synchronization, plain speaking, and effective listening.

MYF105: Communicating with Confidence

During this class, you will build on the concepts presented in MYF104: - Leadership – 3 Routes to Good Communication. Specifically, we will focus on speaking confidently and speaking in public/group environments. You will learn why confidence is important, how to communicate new, effective upwards communication, and how to ensure communications are understood.

MYF106: Building Accountability & Taking Ownership

You will learn three essential tools for effective communication: non-verbal synchronization, plain speaking, and effective listening. These three tools will enable you to establish highly effective communication with other people. They will enable you to create better conditions for communication and a conducive climate that will build trust between you and the people you are talking to.

MYF107: Effective Time Management*

Time is one of the most valuable commodities that we have. You must be able to effectively manage and prioritize their time in order to be as efficient as possible. This course is going to give you the tools to manage your tasks on a daily, weekly, monthly, and even yearly basis.

MYF108: Problem Solving

This course will give you the tools and confidence to successfully resolve people and product issues, and redefine success to help ACCC move forward and reach its goals. You will learn how to define problems, determine the causes, brainstorm solutions, evaluate options, implement solutions, and monitor the outcome.

Managing Others (MOS)

(Drive results by managing behaviors, personalities, and feedback)

Course Overview:

Managing people is much more of an art than it is a science. There is no secret formula or set of rules to follow. Like any true art it takes practice and a relentless commitment to developing that art. This course will allow ACCC leaders develop the skills needed to manage their employees' differing behaviors, personalities, and feedback styles.

Enabling Objectives:

The leadership team will be able to understand how identifying different personalities, feedback preferences, and employee behaviors can ensure efficient and effective interactions with their employees to drive their teams' success.

Competencies:

Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups.

Supporting Value(s):

Teamwork Divides the Task and Multiplies the Success
Our Customers Are Why We Exist
Every Claim is Mission Critical
No Shortcut to Greatness

Delivery Method:

Blended

Length of Time:

13.5 hours

Classes and Learner Activities:

MOS101: Attracting Top Talent (HR)

Attracting and identifying top is a large portion of making sure that ACCC embodies the value *Teamwork Divides the Task and Multiplies the Success*. You need to make sure that you are attracting the top talent to fill open positions at ACCC. Of equal importance, you must have the skill set to select the most qualified candidates. This course will provide you with the tools and guidance to perform both.

MOS102: Expectations – Behavior Management (HR)

Clarity is the pathway to solid results; however, clarity isn't always an attribute found in an abundant supply. This course is designed to allow you to: set clear behavioral expectations, identify employee behavior issues, facilitate a behavior coaching conversation, and appropriately document the employee's discussion log.

MOS103: Understanding Family & Medical Leave (HR)

The Family and Medical Leave Act (FMLA) provides certain employees with up to 12 week of unpaid, job-protected leave per year. FMLA is designed to help employees balance their work and family responsibilities by allowing them to take reasonable unpaid leave for certain family and medical reasons. During this class, you will learn what FMLA is, when an employee may be eligible for it, and how to report these absences to the Human Resource Department.

MOS104: How to Effectively Train Your Staff

As leaders, there will be times when you will have to train your staff on a new process, procedure, law, regulation, etc. This class will provide you with tools to ensure that your training is effective, efficient, and provides your employee with the knowledge, skill, or ability.

MOS105: Giving Praise*

A job well done deserves to be noticed. Do you know how to show praise your employees? This course will teach you the six w's (what, when, why, where, who, and how) of giving positive feedback to your team, individually and together.

MOS106: Giving Tough Feedback

Giving positive feedback usually comes easy to us; however, not all situations are going to merit positive feedback. Sometimes we as leaders need to address a performance or behavioral issue with an employee. How should we go about doing this? After this course you will know the most effective way to deliver tough feedback. Help individuals and your organization perform better by giving valuable feedback using the SPIN process. Support employees by giving tough feedback with a collaborative, positive, and action-focused style.

MOS107: How to Conduct a 1:1

Are you getting the most out of your one on ones? After completing this workshop you will be prepared to have efficient and effective one on ones with your direct reports. You will gain the tools to keep track of their performance, what coaching / training they may need, and how to keep yourself and your employee accountable.

MOS108: Developing an Action Plan

Now that you understand how to conduct a 1:1, giving tough feedback, and giving praise, let's look at how to develop an action plan. An action plan provides an outline the steps needed to move an employee from where they currently are, to where they need to be. The more precise and tailored your action plan, the higher the likelihood of success.

MOS109: Managing Different Personalities*

Every day we face multiple personalities that we need to understand how to manage. This course will help you identify different personality types and the best way to approach managing them.

MOS110: Driving Engagement within Your Team*

Quality communication can't be a one-time occurrence. It must be a long-term strategy engrained into your teams' culture and your approach to interacting with each team member. This course will equip you with the tools required to engage and empower your team; creating camaraderie, trust, and a collaborative team environment.

MOS111: Petitioning for Employee Promotions

What happens when you have a high performing employee that consistently achieves or exceeds department goals? You should petition for their promotion. Employees need to know that their hard work is paying off. When you actively petition for their promotion, it allows them to confidently continue to work hard for ACCC. This course will outline when you should begin preparing a petition for your employee's promotion.

Managing Your Team's Performance (MPE)

(Directing your team to success)

Course Overview:

In this course the leader will learn how to direct team to success by communicating performance expectations and implementing effective performance management processes in day to day duties. Leaders will also learn how to communicate how each performance expectation supports the ACCC Mission, Vision, and Values.

Enabling Objectives:

ACCC Leadership will begin to immediately apply timely performance management with consistency, documentation and follow up at a rate of 100%. The participant will also learn how to communicate how each performance expectation supports the ACCC Mission, Vision, and Values. The necessary competencies to achieve this will be identified. If a leader is lacking a competency, they will put a development plan in place to improve in the lower skilled competency.

Competencies:

Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen

Supporting Value(s):

Teamwork Divides the Task and Multiplies the Success
Our Customers Are Why We Exist
Every Claim is Mission Critical
No Shortcut to Greatness
Our Agents' Success is Our Success
ACCC Gives Back

Delivery Method:

Blended

Length of time:

16 hours

Classes and Learner Activities:

MPE101: Setting Performance Expectations

One of the most important things you will communicate to your team are their performance expectations. To be successful, it is essential they know what is expected of them, including what they must do and how to achieve their goals. Communicating the performance

expectations with your team should be a top priority. This communication lays the foundation and will help ensure success long term. In this class you will learn how to communicate clear expectations to your team and identify how they align with the ACCC Mission, Vision and Values. You will be provided with a communication plan template and a checklist that will help guide your expectation conversation.

MPE102: Preventing Performance Problems

Practice how to avoid employee performance issues by focusing on preventative tactics. How to hire the right people, how to communicate clear expectations, how to motivate employees and maximize their performance.

MPE103: Analyze for Performance and Identify Performance Problems

Practice how to utilize ACCC tools to analyze, detect trends and assess employee performance issues before they reach a crisis point. In this class you will outline a proactive approach for getting to the root of poor performance, practice addressing performance issues, spot the warning signs of low team morale and improving attitude problems. You will also learn how to research training tools and measure and assure improvement. You will be given tools to assist with an identified performance problem such as an informal employee action plan, how to request a training, and how to leverage the ACCC Virtual Campus.

MPE104: Effectively Disciplining Problem Performance (HR)

This class will cover fair, measured, consistent techniques designed to minimize conflict and encourage positive change. Learn how to conduct a formal employee performance coaching conversation, how to document the conversation in the HRIS discussion log, how to develop an action plan for your employees' success and how to involve HR if your employee's performance does not make a positive change.

MPE105: Leading Team Meetings

In this class on Leading Team Meetings, you'll learn effective processes for handling the key stages that you need to cover in a team meeting. We cover the crucial role of the leader during a well-run team meeting, and the 3 steps you can follow to make your meeting productive. The course comes complete with games, examples, simulations, and audio-narrated video to help increase your knowledge.

MPE106: Side By Side Observations/Coaching

Observing your staff while they are on the job is important. It is important for leaders to provide "real time" coaching while observing staff that is aligned with team goals and ACCC MVVs. In this class practice and receive the tools needed to effectively conduct these side by sides for success.

MPE107: Monthly Report Submission

Monthly reporting is important. It documents progress toward achieving ACCC and department goals. It also promotes continuous improvement and helps you track accomplishments, challenges and is an important resource for your supervisor to stay informed about the work going on in your team. In this class learn how to complete a monthly report and capture your team's important data. Learn how to read and analyze the report, and submit a written summary along with the excel document.

MPE108: Employee Mid-year and Annual Performance Review (HR)

Learn how to conduct a productive, professional performance discussion with employees that will help you direct your team to success. Role play and discover how a performance review is an opportunity to coach and encourage improved employee results that generate long term benefits to your organization. Learn six strategies to make your review more powerful, less negative and leaves staff feeling motivated to move in the right direction.

MPE109: Develop Employees

One of the key responsibilities of any manager is to coach and develop employees. Not only does this include building skills and capabilities for a current job, but also helping an employee get ready and develop for the future. All managers should be helping their employees be successful in their current job and identify future required skills for the future. This not only helps the employee be successful, but the company too. Leave this class with employee development plans, learn how to leverage the ACCC virtual campus for training and development

MPE110: Effectively Disciplining Problem Behavior - STEP (HR)

This course will cover fair, measured, consistent techniques designed to minimize tardiness/attendance issues and encourage positive change. Learn how to conduct a formal employee tardiness/attendance coaching conversation, how to document the conversation in the HRIS discussion log, how to develop an action plan for your employees' success and how to involve HR if your employee's behavior does not make a positive change.

MPE111: Effectively Disciplining Problem Behavior – Negative Employee (HR)

This course will cover fair, measured, consistent techniques designed to minimize conflict and encourage positive change. Learn how to conduct a formal employee behavior coaching conversation, how to document the conversation in the HRIS discussion log, how to develop an action plan for your employees' success and how to involve HR if your employee's performance does not make a positive change.

LDP Core Curriculum Competencies and Values

Course Number	Course Name	Competencies	Value	Credit Hour
LEADERSHIP TEAM BUILDING (LTB)				
LTB101	Joining Forces: What Makes a Team	Drives vision and purpose, collaborates, interpersonal savvy, communicates effectively, values differences, manages conflict, instills trust.	Teamwork Divides the Task and Multiplies the Success	1.5
LTB102	Understanding Different Communication Styles	Drives vision and purpose, collaborates, interpersonal savvy, communicates effectively, values differences, manages conflict, instills trust.	Teamwork Divides the Task and Multiplies the Success	1
LTB103	Difficult Personalities and Difficult Situations	Drives vision and purpose, collaborates, interpersonal savvy, communicates effectively, values differences, manages conflict, instills trust.	Teamwork Divides the Task and Multiplies the Success	1
LTB104	Team-Building Survival Skills	Drives vision and purpose, collaborates, interpersonal savvy, communicates effectively, values differences, manages conflict, instills trust.	Teamwork Divides the Task and Multiplies the Success	3
			Total	6.5

UNDERSTANDING YOUR RESPONSIBILITIES AND EXPECTED COMPETENCIES (URE)				
URE101	ACCC Leader Required Competencies	Accountability, drives results, plans and aligns, action oriented, customer focused, develops talent, drives engagement.	Our Customers Are Why We Exist, Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	2
URE102	Expectation – Performance management/Driving results	Accountability, drives results, plans and aligns, action oriented, customer focused, develops talent, drives engagement.	Our Customers Are Why We Exist, Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness, Every Claim is Mission Critical, Our Agents' Success is Our Success	2.5

ACCC Leadership Needs Analysis

URE103	Expectation – Successfully Onboard New Employees (HR)	Accountability, drives results, plans and aligns, action oriented, customer focused, develops talent, drives engagement.	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness,	2
			Total	6.5

MANAGING YOURSELF (MYE)				
MYF101	Be an Expert in Your Field	Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.	No Shortcut to Greatness, Every Claim is Mission Critical, Our Agents' Success is Our Success	1
MYF102	How to Build an Effective Team	Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.	Teamwork Divides the Task and Multiplies the Success	2
MYF103	Professional Development	Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	1
MYF104	Leadership – 3 Routes to Good Communication	Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	1
MYF105	Communicating with Confidence	Communicates effectively, Interpersonal Savvy, Intrapersonal Savvy, Self-development	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	3
MYF106	Building Accountability & Taking Ownership	Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.	No Shortcut to Greatness	2
MYF107	Effective Time Management	Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.	Teamwork Divides the Task and Multiplies the Success, Every Claim is Mission Critical, No Shortcut to Greatness	1

ACCC Leadership Needs Analysis

MYF108	Problem Solving	Drive and purpose, increased capacity to learn, increased self-awareness, developing adaptability.	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Always First, Every Claim is Mission Critical, No Shortcut to Greatness	1
			Total	12

MANAGING OTHERS (MOS)				
MOS101	Attracting Top Talent (HR)	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Always First	1
MOS102	Expectations – Behavior Management (HR)	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	2
MOS103	Understanding Family & Medical Leave (HR)	Communicates effectively, Business insight,	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	1
MOS104	How to Effectively Train Your Staff	Communicating effectively, Develops talent	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	2
MOS105	Giving Praise	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	1
MOS106	Giving Tough Feedback	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	1
MOS107	How to Conduct a 1:1	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	1.5

ACCC Leadership Needs Analysis

MOS108	Developing an Action Plan	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	1
MOS109	Managing Different Personalities	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	1
MOS110	Driving Engagement within Your Team	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	1
MOS111	Petitioning for Employee Promotions	Communicating effectively, developing others, building and maintaining relationships, managing effective teams and work groups	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	1
			Total	13.5

MANAGING YOUR TEAM'S PERFORMANCE (MPE)				
MPE101	Setting Performance Expectations	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	2
MPE102	Preventing Performance Problems	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	2
MPE103	Analyze for Performance and Identify Performance Problems	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Always First, Every Claim is Mission Critical, No Shortcut to Greatness	2

ACCC Leadership Needs Analysis

MPE104	Effectively Disciplining Problem Performance (HR)	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	No Shortcut to Greatness	1.5
MPE105	Leading Team Meetings	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness	1
MPE106	Side By Side Observations/Coaching	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	1
MPE107	Monthly Report Submission	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, No Shortcut to Greatness	1
MPE108	Employee Mid-year and Annual Performance Review (HR)	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness, ACCC Gives Back	1.5
MPE109	Develop Employees	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	Teamwork Divides the Task and Multiplies the Success, Our Customers Are Why We Exist, Every Claim is Mission Critical, No Shortcut to Greatness, Our Agents' Success is Our Success, ACCC Gives Back	1
MPE110	Effectively Disciplining Problem Behavior - STEP (HR)	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	No Shortcut to Greatness	1.5

ACCC Leadership Needs Analysis

MPE111	Effectively Disciplining Problem Behavior – Negative Employee (HR)	Ensures Accountability, Action Oriented, Drives Results, Plans and Aligns, Resourcefulness, Optimizes Work Processes, Business Acumen	No Shortcut to Greatness	1.5
			Total	16
			Total Curriculum Hours	54.5

THE FUTURE OF THE PROGRAM

As the LDP matures, we will be able to tailor the courses to directly align with the responsibilities of each level of leadership. After the first year of the LDP, leaders will be expected to complete 20 - 25 hours of ongoing leadership coursework per year. We envision that the curriculum will create a course sequence that will parallel the leader's development and pursuit of reaching the next level of leadership. The curriculum is built on the premise of having three designations within each leadership level: Future Leader, New Leader, and Existing leader.

Future Leader

The future leader designation is applicable to employees who are in pursuit of the next leadership level. This designation begins when an employee has been identified as a high performer who should be considered for leadership. For example, if a Team Lead, CSR II, or Trainer has been identified as someone who would be a good fit for leadership, they would be selected to begin completing courses within the future leader curriculum. During this period they would continue to perform their current job responsibilities, while also being introduced to responsibilities and trainings pertaining to the next role. The next level of leadership can be inside or outside of the leader's current department. Leaders are encouraged to have exposure to multiple departments to gain a better understanding of how the total business operates. This future leader status would appear at all levels: Supervisors identified as potential fits for Manager, Managers identified as good fits for Directors, and so on.

New Leader

The new leader designation is applicable to leaders who have just been promoted into their leadership level. This designation would apply to leaders that are in the first 12 months of their role. The new leader is responsible for completed all tasks and responsibilities outlined at their leadership level while completing the courses trainings. These courses would build upon the knowledge gained within the future leader curriculum while providing greater depth of the subject matter. The new leader would be assigned a mentor to help them along their career path. This new leader status would appear at all leadership levels: New Supervisor, New Manager, New Director, etc.

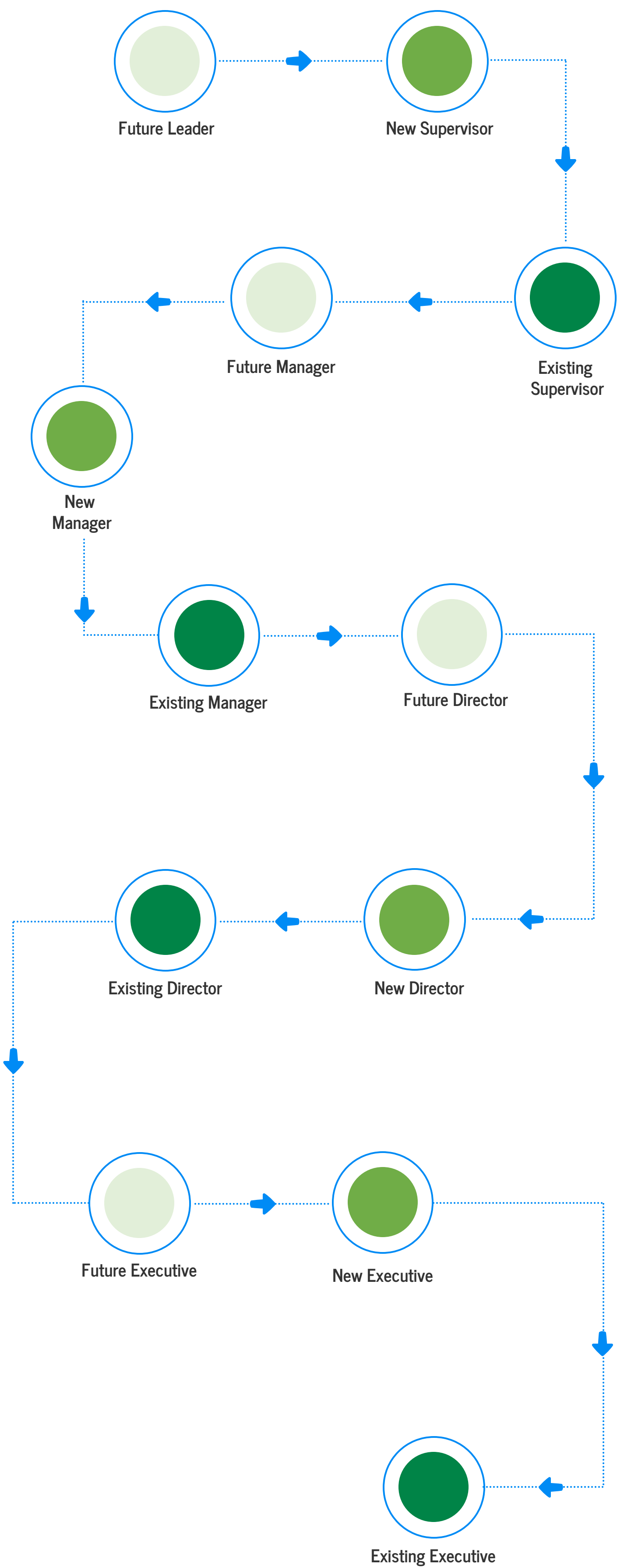
Existing Leader

The existing leader designation is applicable to leaders who have been in their role for 12+ months **and** completed all of the courses outlined in the new leader curriculum. The existing leader is responsible for completed all tasks and responsibilities outlined at their leadership level while completing the courses trainings. The goal of this curriculum is to continuously build on the skills and knowledge gained in the future and new leader courses. This will allow existing leaders to complete ongoing and remedial trainings. The existing leader will have the opportunity to volunteer as a mentor to new leaders as long as their performance is up to par. This existing leader status would appear at all leadership levels. If an existing leader has completed all assigned courses, and they are identified as a potential fit for the next leadership level, they may transition into the future leader curriculum for the next leadership level.

The infographic on the next page outlines how the Leadership Development Program will provide training to accompany career paths; fostering long-term employees which keeps knowledge and experience in-house.

Curriculum of the

Leadership Development Program





L

**Leadership is created
through education and
experience.**

E

**Evaluation fosters
quality and
effectiveness.**

A

**Accountability creates
excellence.**

R

**Responsibility creates
value.**

N

**No shortcuts to
greatness!**

APPENDICES

The following pages will provide copies of the Leadership Survey Questions (Appendix A), Leadership Interview Questions (Appendix B), and the Leadership Survey & Interview Summary (Appendix C).

ACCC Leadership Survey

Welcome to the ACCC Leadership Survey!

This survey explores the business and management challenges of ACCC and the capabilities needed to successfully address those challenges. You will need about 30 minutes to complete the survey. Note: Your response is anonymous and will be combined with the responses of other leaders. As an anonymous survey, please refrain from including any specific employee names or detailed occurrences pertaining to your department. A response is required for questions marked with an *. Thank you in advance for your contribution!

Organizational Capabilities

The questions in this section focus on ACCC's ability to manage resources to effectively gain an advantage over our competitors.

- * 1. Management - Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Leaders at all levels
	Leaders with strong business acumen
	Minimal bureaucracy and action oriented
	Walking the talk/living the values
	Open to learning from other people and organizations
	Proactive and industry leader

- * 2. Behaviors & Beliefs - Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Clear understanding of vision and strategies
	Flexible and responsive
	Decisive and fast on our feet
	Goals/resources aligned with vision and strategies
	Focus on doing what's right for the overall organization
	Strong sense of accountability

* 3. Mindsets - Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Customer focused
	People oriented
	Performance oriented
	Collaboration and teamwork
	Decentralized decision-making
	Emphasis on long-term growth

* 4. Department Structure - Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Cross-departmental supervisor and manager meetings
	How to identify high performing team members
	Establish career paths for employees
	How to conduct effective meetings
	Department metrics/KPIs/clear expectations
	Holding leaders and staff accountable

* 5. List any other organizational capabilities that you think have a critical need for improvement and are critical to our success.

Leadership Capabilities

The questions in this section focus on the characteristics of ACCC's current leadership and their ability to manage resources to effectively gain an advantage over our competitors.

* 6. Industry Knowledge - Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills). . Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Understanding customers
	Understanding the competition
	Understanding the total business
	Understanding and appreciating national and cultural differences
	Understanding team goals and expectations
	Understanding legal/regulatory issues and requirements

* 7. Management Knowledge - Below is a list of 8 leadership capabilities (mindsets, knowledge, and skills). . Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 8 = Least Critical.

	How to conduct a team analysis and identify improvement opportunities
	How to conduct coaching conversations
	How to onboard a new employee
	How to measure and assure performance improvement
	How to identify high performing team members
	How to write a performance evaluation
	How to train my staff
	How to manage competing priorities

* 8. Problem Solving - Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills). . Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Research and request training
	Know and understand my department's metrics
	Problem solving and critical thinking
	Developing effective strategies
	Successfully implementing strategies
	Ensuring total quality

* 9. Work Environment - Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills). . Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Creating an environment that results in retaining our best talent
	Motivating people
	Inspiring pride in the organization
	Role modeling our values
	Managing people who undermine team performance
	Resolving conflict

* 10. Employee Support - Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills). . Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

	Ensuring team members are involved in important decisions that affect them
	Creating accountability for performance and results
	Setting clear goals and priorities
	Treating people with respect and dignity
	Meeting commitments
	Mentorship (Providing guidance to new employees gained through one's knowledge and experiences)

* 11. List any other leadership capabilities that you think have a critical need for improvement and are critical to our success.

Leadership Development Challenges

- * 12. If you were to attend a leadership development program, what topics would you want to see covered that would make it most valuable to you personally?

- * 13. Based on your past leadership development experiences, what have been the most effective ways for you to learn?

* 14. As an ACCC leader what major changes and challenges (internal and external) do you anticipate facing in the next one to three years?

	I don't know	No Impact	Small Impact	Substantial Impact	Huge Impact
More Competitors	☐	☐	☐	☐	☐
Improved quality of competition	☐	☐	☐	☐	☐
More demanding customers	☐	☐	☐	☐	☐
More sophisticated customers	☐	☐	☐	☐	☐
Drastic reduction in prices	☐	☐	☐	☐	☐
More strict legal and regulatory constraints	☐	☐	☐	☐	☐
Increased competition for the best talent	☐	☐	☐	☐	☐
More companies doing business through the Internet	☐	☐	☐	☐	☐
Embodying the Mission, Vision, and Values	☐	☐	☐	☐	☐
Rapid technological change	☐	☐	☐	☐	☐
Performance Management	☐	☐	☐	☐	☐
Internal systems	☐	☐	☐	☐	☐
Staffing	☐	☐	☐	☐	☐
Changing employee lifestyles, values, etc.	☐	☐	☐	☐	☐

* 15. List any other challenges and changes that you think will have a major impact on the organization in the next few years.

ACCC Strengths and Weaknesses

* 16. What are the competitive strengths and weaknesses of this organization?

	I don't know	Not Important	Weakness	Neither Strength or Weakness	Strength
Our Mission, Vision, & Values	☐	☐	☐	☐	☐
Our commitment to our vision	☐	☐	☐	☐	☐
Our strategies for achieving the vision	☐	☐	☐	☐	☐
Our strategy execution	☐	☐	☐	☐	☐
Our customer service	☐	☐	☐	☐	☐
Customer loyalty	☐	☐	☐	☐	☐
Speed of decision making	☐	☐	☐	☐	☐
Quality of products and/or services	☐	☐	☐	☐	☐
E-business strategy	☐	☐	☐	☐	☐
Internal technology/systems	☐	☐	☐	☐	☐
Financial strength and resources	☐	☐	☐	☐	☐
Market position	☐	☐	☐	☐	☐
Our technology	☐	☐	☐	☐	☐
Research and Development	☐	☐	☐	☐	☐
Our brand(s)	☐	☐	☐	☐	☐
Ability to innovate	☐	☐	☐	☐	☐
Top leadership	☐	☐	☐	☐	☐
Willingness to take risks	☐	☐	☐	☐	☐
Ability to communicate/collaborate across the organization	☐	☐	☐	☐	☐

	I don't know	Not Important	Weakness	Neither Strength or Weakness	Strength
Ability to attract and retain top talent	☐	☐	☐	☐	☐
Our values and culture	☐	☐	☐	☐	☐
Depth of leadership talent	☐	☐	☐	☐	☐
Quality and commitment of our people	☐	☐	☐	☐	☐
Sales/marketing capability	☐	☐	☐	☐	☐
On the job training	☐	☐	☐	☐	☐
Use of the Internet	☐	☐	☐	☐	☐

* 17. What would you say are the top one or two strategic priorities over the next few years?

* 18. List any other critical competitive strengths of ACCC that were not listed or comments about the strengths of ACCC.

* 19. List any other critical competitive weaknesses of ACCC that were not listed or comments about the weaknesses of ACCC.

* 20. What are the one or two most critical barriers to address in order to achieve ACCC's vision and to successfully execute the leadership strategies?

* 21. What are two or three things that you struggle with in managing your employees that you would like help with?

* 22. Please provide any other thoughts or suggestions for future leadership trainings.



Leadership Development Interview Questions

1. What is the overall objective of your job?
 -
2. What responsibilities do you have in your role?
 -
3. How would you describe a typical day at work?
 -
4. How does ACCC measure performance in your role?
 -
5. If you could choose, what would be your top three priority topics for leadership training and development this year?
 -
 -
 -
6. What improvements can we make to the way we deliver our trainings for leadership?
 -
7. What in-house training have you or your colleagues benefited from in the past and why?
 -
8. What do you know about the leadership training (courses, programs) we offer?
 -
9. What are some of the barriers you face when it comes to participating in our training programs?
 -
10. What challenges do you face that could be resolved with training?
 -
11. Is there a way we can make the courses and workshops we offer more accessible to you?
 -
12. Do you see the start of any emerging leadership training need(s) that you think may need attention over next 1-2 years?
 -



Leadership Development Interview Questions

13. What gaps exist between knowledge, skills, and attitudes of our current leadership team today and those required to support the Mission, Vision, and Values of ACCC?
 -
14. What event during your career contributed most to your personal growth and development?
 -
15. If you were a mentor for a high-potential new employee, what advice would you give them about the types of jobs, experiences, and exposures they should get while at ACCC?
 -
16. What topics would you want to see covered in a leadership development program to make it valuable for Supervisors?
 -
17. What approaches to learning do you believe would be most effective?
 -
18. What type of team analysis of strengths/areas of opportunity to you currently conduct?
 -
19. How do you currently identify high/low performers?
 -
20. How do you currently manage performance and develop your employees?
 -
21. Is there anything else that I should know in order to help design a great leadership development program for our company?
 -



ACCC Leadership Program

Needs Analysis:

Survey & Interview Summary

Program Objectives



To provide and outline clear ACCC leadership expectations for Supervisors, Managers, Directors, and Executives.



To help ACCC leadership develop the essential technical and soft skills required to consistently analyze staff performance, manage performance issues, motivate staff to achieve KPI's, and drive the Mission, Vision, and Values of ACCC.

Collection Methods

On June 7, 2018 the ACCC Leadership Survey was sent out to 95 leaders via a hyperlink to SurveyMonkey.com. The survey was officially closed on Thursday June 14, 2018 at 8:30 AM. We had a great turnout, with a participation rate of 86% (82/95).

A group of 27 current ACCC Leaders were interviewed between June 8th and June 18th of 2018 regarding the current state of leadership in the company. The leaders that participated provided representation of multiple departments and various levels including Supervisors, Managers, Directors, and ET members.



LEADERSHIP SURVEY RESULTS

Management – Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

01



1. Leaders with strong business acumen
2. Leaders at all levels
- 3. Walking the talk/living the values**
4. Proactive and industry leader
5. Open to learning from other people and organizations
6. Minimal bureaucracy and action oriented

Behaviors & Beliefs – Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

02



- 1. Clear understanding of vision and strategies**
- 2. Goals/resources aligned with vision and strategies**
3. Focus on doing what's right for the overall organization
- 4. Strong sense of accountability**
5. Flexible and responsive
6. Decisive and fast on our feet

Mindsets – Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

03



- 1. Customer focused**
2. Collaboration and teamwork
3. People oriented
4. Performance oriented
5. Emphasis on long-term growth
6. Decentralized decision-making

Department Structure – Below is a list of 6 organizational capabilities. Click and drag each choice (or use the drop downs) to rank the organizational capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

04



1. Holding leaders and staff accountable
2. Department metrics/KPIs/clear expectations
3. How to identify high performing team members
4. Cross-departmental supervisor and manager meetings
5. Establish career paths for employees
6. How to conduct effective meetings

List any other organizational capabilities that you think have a critical need for improvement and are critical to our success. (Comment Box Provided).

05



27% - Communication

21% - Training

11% - Accountability

10% - Employee Engagement / Appreciation

7% - Retention / Turnover

5% - Performance Indicators

Industry Knowledge – Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills).. Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC’s success over the next few years. 1 = Most Critical. 6 = Least Critical.

06



1. Understanding customers
2. Understanding the total business
3. Understanding legal/regulatory issues and requirements
4. Understanding team goals and expectations
5. Understanding the competition
6. Understanding and appreciating national and cultural differences

Management Knowledge – Below is a list of 8 leadership capabilities (mindsets, knowledge, and skills). Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 8 = Least Critical.

07



1. How to conduct a team analysis and identify improvement opportunities
2. How to train my staff
3. How to measure and assure performance improvement
4. How to conduct coaching conversations
5. How to identify high performing team members
6. How to manage competing priorities
7. How to onboard a new employee
8. How to write a performance evaluation

Problem Solving – Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills). Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

08



- 1. Know and understand my department's metrics**
- 2. Problem solving and critical thinking**
3. Developing effective strategies
4. Successfully implementing strategies
- 5. Research and request training**
6. Ensuring total quality

Work Environment – Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills). Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

09



1. Creating an environment that results in retaining our best talent
2. Motivating people
3. Role modeling our values
4. Inspiring pride in the organization
5. Resolving conflict
6. Managing people who undermine team performance

Employee Support – Below is a list of 6 leadership capabilities (mindsets, knowledge, and skills). Click and drag each choice (or use the drop downs) to rank the leadership capabilities against each other in order of which is the most critical to ensure ACCC's success over the next few years. 1 = Most Critical. 6 = Least Critical.

10



1. Treating people with respect and dignity
2. Setting clear goals and priorities
3. Creating accountability for performance and results
4. Ensuring team members are involved in important decisions that affect them
5. Mentorship (Providing guidance to new employees gained through one's knowledge and experiences)
6. Meeting commitments

List any other leadership capabilities that you think have a critical need for improvement and are critical to our success. (Comment Box Provided).

11



21% - Communication
9% - Training & Development
6% - Trust
5% - Accountability
5% - Performance Indicators
3% - Employee Input

If you were to attend a leadership development program, what topics would you want to see covered that would make it most valuable to you personally? (Comment Box Provided).

12



- 44% - Mentoring, Motivating, Coaching, & Developing Employees
- 25% - Communication & Accountability
- 9% - Employee Engagement/Empowerment
- 9% - Conflict Management
- 9% - Time Management
- 4% - Hiring & Interviewing

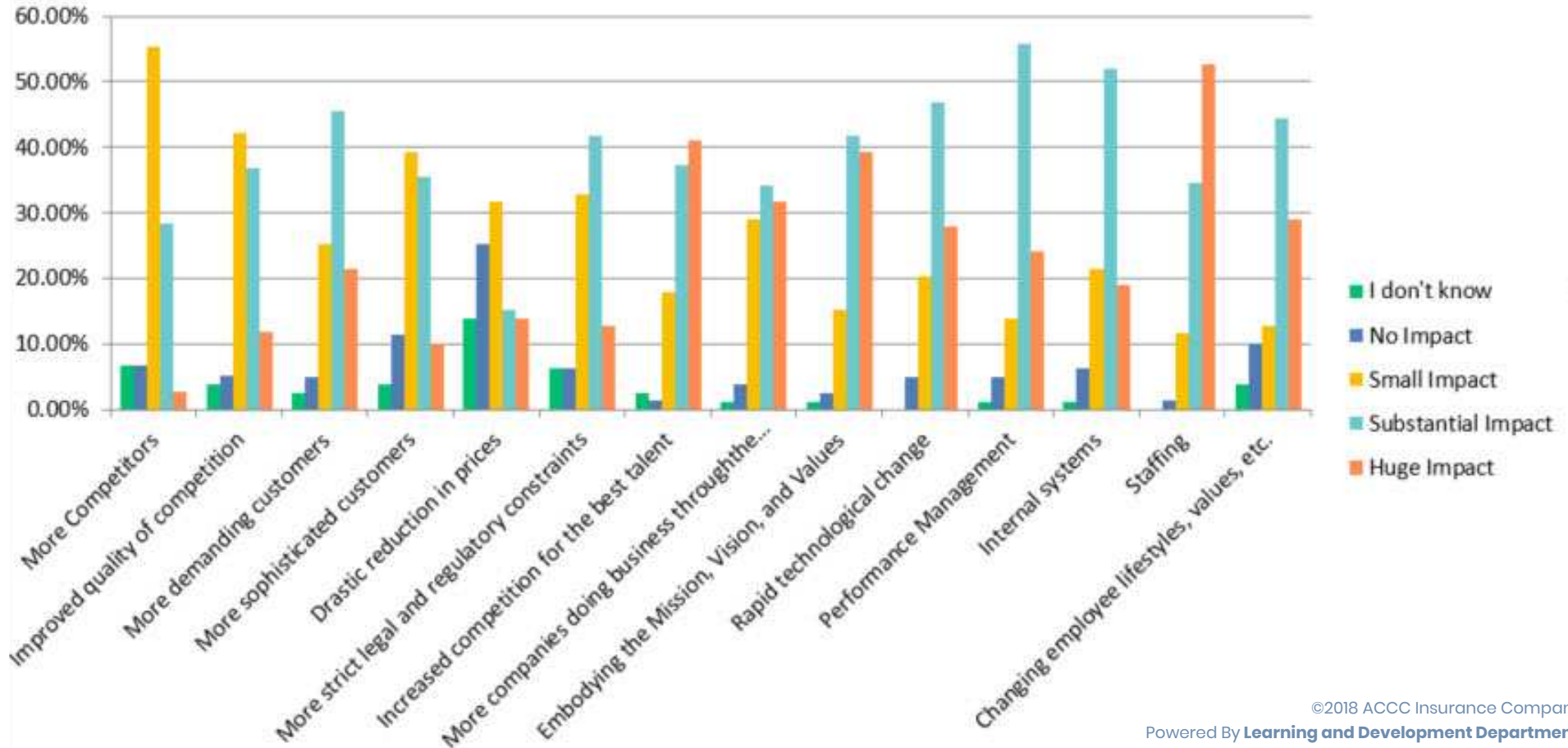
Based on your past leadership development experiences, what have been the most effective ways for you to learn? (Comment Box Provided).

13



35% - Instructor led (classroom or group settings)
27% - Hands on / On the job
11% - Online courses or videos
10% - Mentorship / Peer interactions
5% - Virtual / WebEx
5% - Short Meeting
5% - Reading content

As an ACCC leader what major changes and challenges (internal and external) do you anticipate facing in the next one to three years?



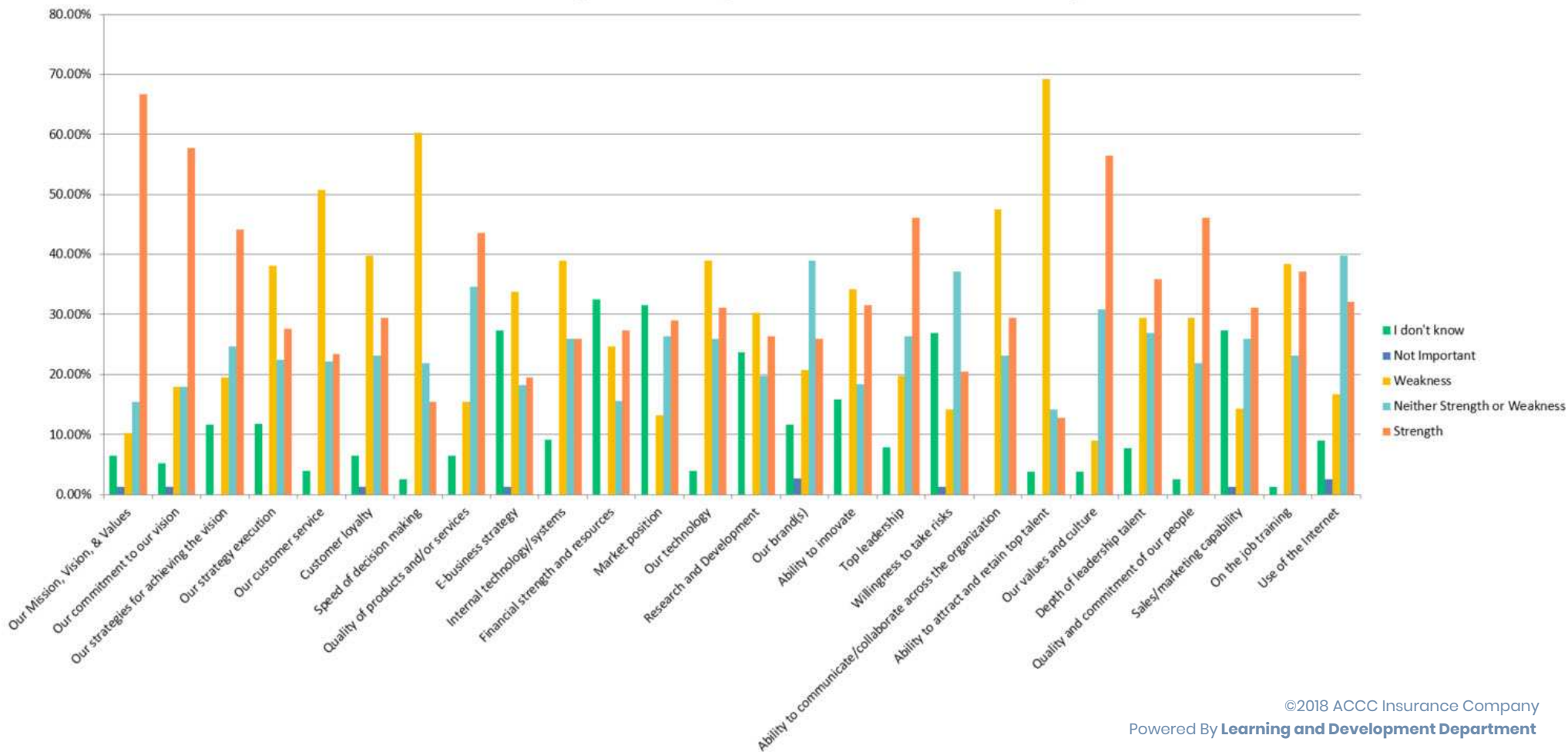
List any other challenges and changes that you think will have a major impact on the organization in the next few years. (Comment Box Provided).

15



46% - Staffing, Training, & Competitive Benefits
8% - Technology
8% - More Training
4% - Better Communication

What are the competitive strengths and weaknesses of this organization?



What would you say are the top one or two strategic priorities over the next few years? (Comment Box Provided).

17



- 40% - Staffing and Employee Retention
- 23% - Customer Service
- 14% - Communication
- 14% - Training and Development
- 13% - Profitability and Performance
- 13% - Mission, Vision, Values
- 5% - Company Branding and Marketing
- 5% - Technology

List any other critical competitive strengths of ACCC that were not listed or comments about the strengths of ACCC. (Comment Box Provided).

18



- Benefits
- Family oriented, good work/life balance
- Community Involvement
- Work Environment
- Unique Market
- Vision and willingness to change
- Employees

List any other critical competitive weaknesses of ACCC that were not listed or comments about the weaknesses of ACCC. (Comment Box Provided).

19



- Employee Salaries / Employee Retention
- Communication
- Leadership (inexperienced, unqualified, etc.)
- Lack of Training

What are the one or two most critical barriers to address in order to achieve ACCC's vision and to successfully execute the leadership strategies? (Comment Box Provided).

20



- Communication and Consistency
- Motivation and Employee Buy-In
- Staffing
- Accountability

What are two or three things that you struggle with in managing your employees that you would like help with? (Comment Box Provided).

21



18% - Developing & Motivating Employees

15% - Negative Employees, Conflict Resolution, Sensitive Issues

15% - Training (for leaders)

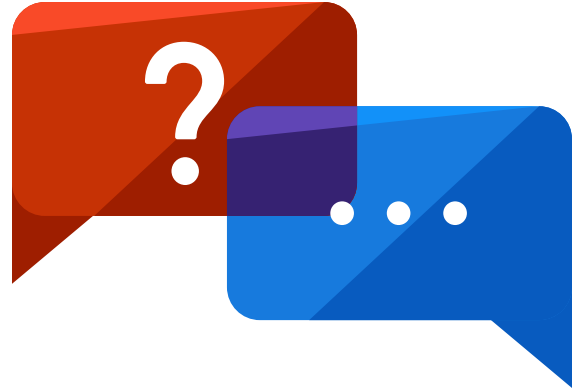
9% - Training (for employees)

Please provide any other thoughts or suggestions for future leadership trainings. (Comment Box Provided).

22



In this question's response there wasn't a recurring theme. Some suggestions were comments on frequency, duration, group size, delivery etc.



LEADER INTERVIEW COMMONALITIES

Need for Improved Communication



- Speaking Confidently & Public Speaking
- Cross Departmental Communication (Helping to Understand the role of each department in the claims cycle)
- “Vertical” communication – how to probe to clearly understand expectations, policies and priorities required to translate directives from the executive team into actionable objectives.
- Topics such as effective communication, interpersonal skills, etc. that will help them to better communicate more effectively with leadership in other departments / business units.
- How to have difficult or sensitive conversations
- How to retain/talk to employees who want to quit

Performance & Accountability

The majority of participants indicated that they were not aware of any company-wide performance assessment/indicators for their role.

There appears to be a need for measurement and ownership within each department. Also, having a clear understand of the manager's primary responsibility and what this means in the workplace.



Preferred Delivery of Training

There was a common belief that online learning was of limited effectiveness as currently delivered, and content could be more effectively delivered in a classroom setting.

However, it was acknowledged that exclusively classroom based training was less efficiently delivered. Preference was expressed for more hands-on, interactive approaches to learning.

They want role play, hands on/interactive learning.



Participant Suggestions for Training



- All of the topics on the Communication slide
- How to address performance and behavior issues
- **How to identify high/low performers or a set process to manage and develop employees**
- How to manage and lead with different personality types
- Professional etiquette
- Dealing with change
- How to lead performance evaluation meetings with employees
- Coaching and mentoring skills
- How to motivate employees