Change Management: Managing the People Side of Change

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Agenda
Let's get started

1. **Introduction to Genworth**
2. **Overview of Genworth history and experience with Pega**
3. **End user perspective – pre and post Pega Implementation**
4. **Change Management Strategies**
5. **Business Outcome of Change Management Program**
6. **Look forward at evolving best practices**

Introduction to Genworth

We're here to help provide financial solutions so you can live your life on your own terms

Long Term Care Insurance

Group LTC Insurance

Genworth®

Homeownership

Care Services

Genworth's History and Experience with Pega

A partnership that has enabled the creation of powerful tool sets for our associates and customers

- **Claim workflows that sustain and enhance our new operations model**

- **A Customer Service unified desktop that allows 80% of our call interactions to occur in one desktop**

- **5 applications built through multiple iterations and successfully rolled out across Claims and Customer Service out since 2016**

- **2 new applications slated for release this year**

- **Pega's engagement and partnership has been integral in Genworth's success of optimizing our customer experience**

Claims Opportunity

| Intake | | Intake | Eligibility | Payment |

| Eligibility | Payment |
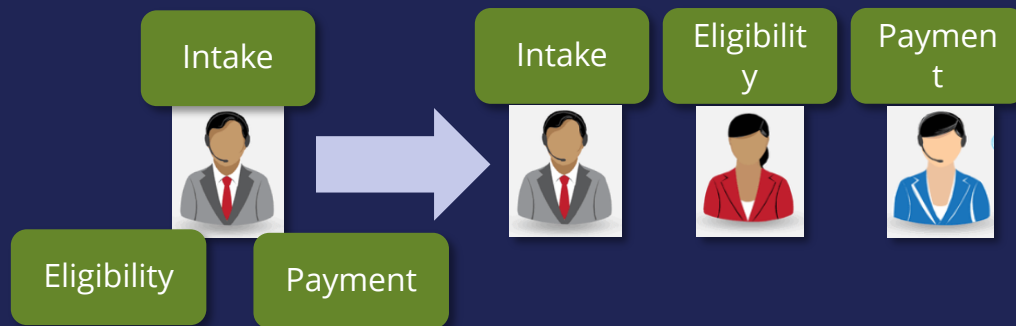
Customer Service Opportunity
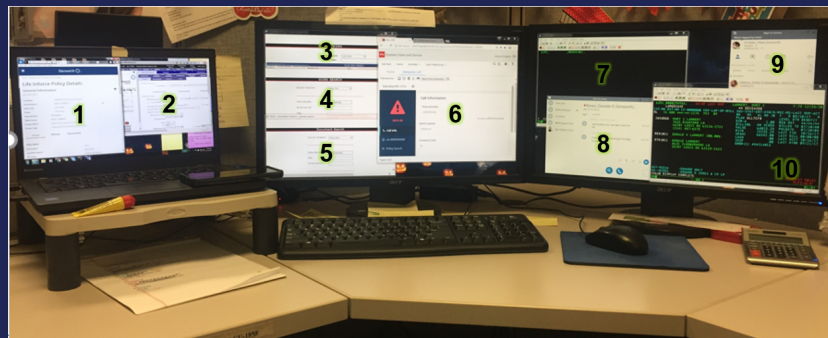
End User Perspective – Pre Pega

Learn from missed opportunities of the past

Prior to the implementation of Pega

- Customer Service Representatives (CSRs):
  - navigated 10-14 applications to service a single call
  - spent an average of 10 minutes on a single call
  - used an average of 3.25 minutes after each call to document what was discussed and create related transaction requests

- Another desktop application was implemented to help reduce the number of systems needed to service a call. This implementation lacked any focus on the end user adoption experience and was solely focused on application functionality, resulting in:
  - low adoption rate
  - confusion over when and how to use the application
  - different training experiences for Team Leaders and CSRs
 - complete business value not realized

End User Perspective – Post Pega

Unwavering focus on the needs of the end user is paramount to successful change management

- Our focus for the Pega implementation was shifted to end users resulting in:
  - higher and faster adoption rate
  - clear direction for when and how to use Pega
  - consistent training experience for team leaders
  - Complete business value being achieved

- Within the first 4 months of implementation, Customer Service Representatives (CSRs):
  - are down to 1 system and 1 application, Pega, to service a single call
  - have decreased call handle time by 17 seconds and trending down
  - have reduced time spent after each call by 58 seconds and trending down
  - New hire training times reduced by 3 weeks
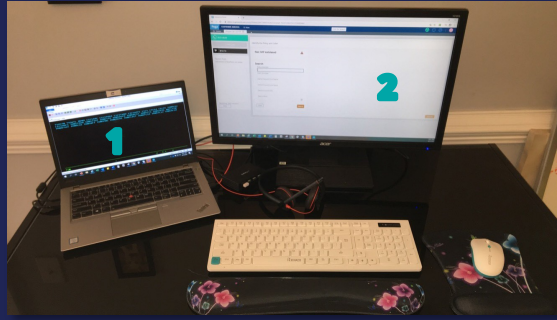
Call Center Metrics

Pre Pega Post Pega
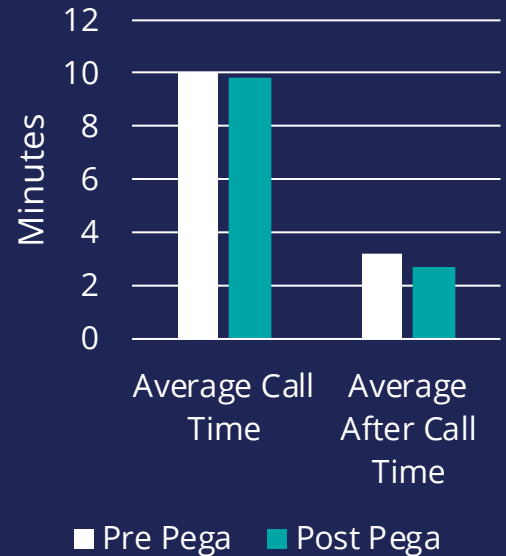
Change Management Strategies & Techniques

Leadership Interviews

- We met with leaders to:
  - define a successful rollout
  - create a collaborative work environment between the Pega project team and business groups
  - determine CSR needs to effectively perform their job responsibilities
  - identify training needs

Social Network Analysis

- A 10 question survey, targeted to end users, was created to help identify who our "Change Champions" would be, based on peer-to-peer review. A Change Champion was defined as someone who:
  - embraces change
  - is helpful to and advocates for their peers
  - holds a positive outlook
  - is a leader in their peer community

Communicate
Communication should transparent, open, honest, and frequent

Collaborate
Develop and maintain a partnership with business leaders and end users

Empower
End users contribute to design, experience, and expectations for successful rollout

Train
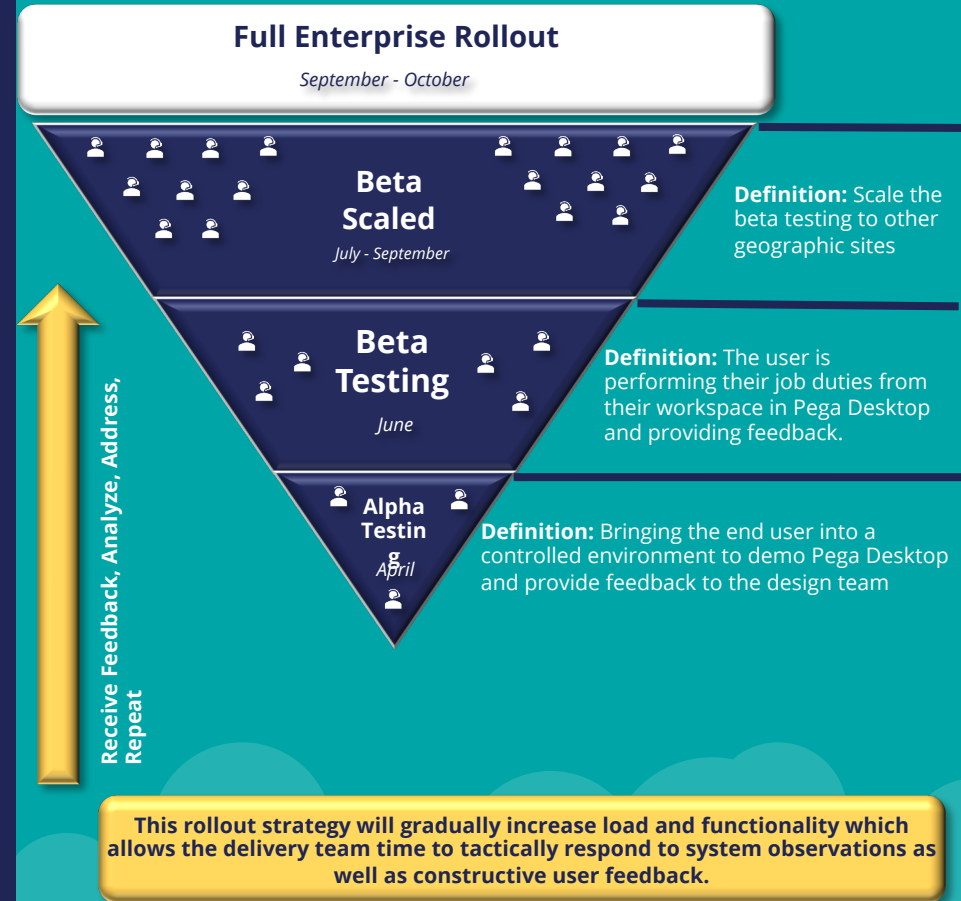Training should be a consistent, interactive, hands-on experience

Change Management Strategies & Techniques

Alpha Testing

- Users come into a controlled environment to experience Pega in the demonstration environment. These "Pega Pods" allowed users to:
  - gain exposure and hands-on experience with Pega prior to training & go-live
  - provide feedback
  - test how intuitive the application was

Beta Testing

- Our Pega Change Champions participated in training sessions and used Pega in production, in conjunction with their existing applications, for three months to:
  - reinforce the accuracy of data
  - provide feedback for experiences & enhancement requests for design
  - report issues and help identify bugs
  - become experts of Pega to assist in the enterprise wide rollout

Full Enterprise Rollout

September - October

Beta Scaled

July - September

Beta Testing

June

Alpha Testing

April

Receive Feedback, Analyze, Address, Repeat

Definition: Scale the beta testing to other geographic sites

Definition: The user is performing their job duties from their workspace in Pega Desktop and providing feedback.

Definition: Bringing the end user into a controlled environment to demo Pega Desktop and provide feedback to the design team

This rollout strategy will gradually increase load and functionality which allows the delivery team time to tactically respond to system observations as well as constructive user feedback.

Change Management Strategies & Techniques

A full on media blitz to your end users facilitates the building of excitement

Building Excitement

- Our Project Team and Business Leaders agreed that we needed to build hype around go live. We accomplished this by:
  - creating Pega Commercials that played on monitors throughout our campuses
  - creating a themed and interactive training experience that broke the old molds of corporate training approaches
  - ordering T-Shirts with the Pega logo that users earned upon the completion of Alpha training to wear on our declared "Pega T-Shirt Fridays"
  - recording a series of Pega Testimonial Videos, with leaders, the Pega development team, and our Beta Testers and strategically distributed them leading up to the release for users to see firsthand how Pega was going to benefit them and add value to their workday

Business Outcome

Making change management a priority will deliver business value faster and more effectively

- By shifting our focus to end users and implementing change management, we saw a higher adoption rate earlier in the transition state

- The themed and interactive training experience equipped users with the knowledge to begin using Pega as soon as they completed training, thus allowing us to reach the benefits of our business case faster than originally anticipated

- Alpha & Beta testing, along with on-going support, allowed the project team to collaborate with end users and leadership to design, train, and implement Pega, while providing more exposure to Pega prior to go-live

- On-going efforts include weekly and monthly sessions with Beta Testers to continue conversations with future releases, chatrooms to provide real time feedback and reporting of issues, and bi-weekly newsletters that keep users informed of all things Pega

The Future of Change Management

Change Management is part of doing business now

- Due to the success of our Change Management Strategy, other strategic programs within Genworth have dedicated resources to create and implement change management strategies across the company

- Large releases for future products now have a media/marketing component to the execution effort

Beta User Testimonials

PEGA

Build for Change®