



# Back to School

In today's business world, the workplace is the new classroom as companies look to beef up their bench strength and compete in an ever-changing marketplace.

One of the biggest reasons customers do business with a company is the service it provides. From personal experience, most of us can agree that shopping at a store with courteous and knowledgeable sales people is much more satisfying than wandering through a warehouse club where price is king but the service needed to make informed buying decisions is lacking.

At Unum, our service execution is built around much the same customer-centric philosophy. As our corporate vision states, we want to be the leading provider of employee benefits — in other words, the preferred choice of customers — that help employers manage their businesses and employees protect their families and livelihoods. We achieve that, of course, by providing the service our customers need to make the best decisions for themselves.

The need to provide top-quality service is converging with employees' desire for education and training to create a "back to school" atmosphere at Unum. A well-trained and knowledgeable workforce is not only our competitive edge in the marketplace, but also prepares the employees of today to be the leaders of tomorrow.

## Ramping up

Over the last 12 months, we've seen a marked increase in both our professional and leadership development programs. That's because employees made it clear in work environment surveys that they wanted more opportunities to develop skills and advance their careers. And it is because our leaders at Unum know it's the right thing to do.

"Employees have been consistent in their survey feedback that they want more opportunities for training at the company," says Eileen Farrar, senior vice president of Human Resources. "They want to better meet the needs of their current roles and prepare themselves for that next career move."

In 2007, the company launched a pair of high-profile leadership development initiatives — the CEO Scholarship and Leadership Excellence and Accelerated Development, or LEAD — geared toward high-potential director- and assistant vice president-level employees. With the former, about a dozen promising leaders from across the company are sent to the University of Virginia's Darden School of Business for an extensive two-week leadership training program. They also are assigned senior leaders from Unum to serve as mentors and participate in issues forums with CEO Tom Watjen as part of their ongoing development.

Colin Fitzgerald, director of national accounts for Unum UK, is a participant in this year's CEO Scholarship program.

"Although we have enjoyed some spectacular success



*"Going forward, our success will only be achieved by really understanding the nuts and bolts that make sustained profitable growth a reality."*

**Colin Fitzgerald**  
**Director of National Accounts**  
**Unum UK**

over the last few years in the U.K., we can already see that a very competitive marketplace is beginning to make this more difficult to achieve," says Fitzgerald. "Going forward, our success will only be achieved by really understanding the nuts and bolts that make sustained, profitable growth a reality. So for me, a key objective is to build on my current skills to achieve just that."

The LEAD program, with participants from Unum's U.S.-based businesses, features training sessions throughout the year and team-based problem solving

# Unum Syllabus

*Here's a catalog of the training & development opportunities*

## SALES AND BROKER DEVELOPMENT

### Unum University

This comprehensive program includes field sales recruiting, training and product education designed to build our competitive advantage by attracting and retaining top talent from the benefits industry. The scope covers eight formal "sales schools" for newly hired reps, 40+ hours of training and education for existing field leadership and sales consultants and 7,000 hours of broker education

### Colonial College

Colonial Life's national sales education program supports 7,300 independent contractor sales profes-

sionals. In addition to offering self-study courses and interactive webinars, instructors located across the country train on Colonial Life's products, services and sales practices.

### UK advisor seminars

Unum UK periodically hosts adviser seminars on new products and service improvements designed to benefit customers as well as legislative and socio-economic changes that impact group risk.



simulations. Mentoring with a senior leader is also an important part of this initiative.

Just as important as adding new development programs is enhancing the visibility of existing courses available to employees. The Colonial Learning Center on the Columbia campus is a great example of the one-stop-shop mentality taking shape.

"The Colonial Learning Center not only gives employees an overview of the training resources available in Columbia, but also makes it easy for them to take advantage of these assets," says Don Montgomery, vice president of HR for Colonial Life. "Whether it's instructor-led classes or computer-based training, you can find it all in the Colonial Learning Center."

In a similar vein, HR's new Training and Development site on Unum Central provides Unum US and corporate staff employees with access to online-based training and information about coursework offered or sponsored by the company. And the Unum UK People Development Programme overview provides a laundry list of the resources available to help employees become more effective in their roles as individual contributors or managers.

## Competitive advantage

From the senior leadership team on one end, to the front-line supervisor on the other, one thing is clear, according to Zach Nelson, Unum's new vice president of Talent Management: a commitment to training and education is key to maintaining and enhancing

our competitive edge in the marketplace.

"Tapping into our talent pipeline and fine-tuning employees' skills is the greatest advantage we have," says Nelson. "It's the best way we have to ensure a steady stream of future leaders ready to take the reins when needed — and provides a solid core of workers who understand what it takes to meet the needs of our customers and get the job done."

Watjen agrees.

"Developing our people is a top priority for us for a couple of reasons," says Watjen. "It's important to create challenging and rewarding opportunities for people within the company; in doing so, we foster a culture of dedicated, committed and knowledgeable employees that I believe is second to none in the industry."

Perhaps nowhere is the value of training more evident than with our sales reps as they pound the pavement for business. At Unum US, for example, the addition of dozens of new reps in the last year has really put the spotlight on their sales training program.

"Having a comprehensive sales training program is vital to our success in the field," says Steve Meahl, senior vice president of Sales for Unum US. "Customers need to feel absolutely certain that they're doing business with someone who understands their needs and has the vision to see how our solutions can benefit them."

## Reaching beyond employees

Our success also depends on the capabilities and skills of the

### LEADERSHIP DEVELOPMENT

#### CEO Scholarship

Launched in 2007, the CEO Scholarship program sends some of our top performing director- and AVP-level employees to the University of Virginia's Darden School of Business for a two-week course in conjunction with a year of self-study, work on a strategic business issue and mentoring by senior Unum leaders.

#### LEAD Program

The Leadership Excellence and Accelerated Development program brings together promising leaders from our U.S. businesses for a year of group study and mentoring with upper management.

#### Aspiring Leaders Program

For U.S.-based employees who aspire to become managers, the ALP program focuses on leadership training and applying process improvement tools to address a business issue.

#### Essential Leadership/Leadership In Action

These interactive programs are designed to help Colonial Life employees grow and develop as leaders. The program offers critical tools and strategies for building and refining leadership skills.

#### Management training

A number of management training courses are available for U.S. and U.K. employees wishing to learn the fundamentals of management, acquire leadership skills and become better mentors for their employees. Examples include the Managing at Unum Program (U.S.), Essential Management (Colonial Life) and the Management Development Programme (U.K.).

brokers, benefits consultant and independent sales reps we partner with. That's where formal programs like Unum University and Colonial College, and less formal training sessions with our partners, come into play.

"Colonial College not only helps us get new salespeople up and running quickly, but it also helps veteran salespeople brush up on their sales skills and product knowledge," says Russ Plyler, vice president of Recruiting, Sales Education and Management Development for Colonial Life. "Our goal is to arm salespeople with the knowledge and tools they need to go out in the marketplace, win new accounts and conduct successful enrollments. Colonial College gives us a consistent sales training and education platform so salespeople can demonstrate our brand every day."

The goals are much the same with Unum University.

"Although we conducted field sales and broker training workshops for years, it's just been in the last 12 months that we've formalized our education program as Unum University," says Mike Simonds, senior vice president of Marketing and Product Development for Unum US. "Michelle Boucher and her team in field training have done an outstanding job getting it up and running over the past year."

Sharing our knowledge and expertise will become increasingly important as the benefits landscape becomes more complicated over the coming months and years — with regulatory changes, the introduction of more choice and the increasing shift to a defined contribution model. That's why there is real value in offering the resources of Unum University to our partners, making sure they



*Employees from Unum UK, Colonial Life and Unum US had a rare opportunity to sit face-to-face to discuss common challenges and solutions at the LEAD (Leadership Excellence and Accelerated Development) conference held in Chattanooga in January.*

have the expertise needed to determine the right solution to offer customers.

## It's up to you

Offering training and development opportunities is only half of the equation. It's up to each of us to take advantage of these resources and make it a priority.

"Performance plans are a good start, but at the end of the day it really depends on the commitment each employee and his or her manager makes to the development process," says Farrar.

And despite what you may think, it is easy to get started.

"Ask yourself what you want to accomplish and then work with your manager to support your goal going forward," advises Nelson. "It takes a willingness to be open to new roles and experiences within the company, and an openness to taking risks." ●

# Unum syllabus

## INDIVIDUAL DEVELOPMENT

### Insurance Education

Unum partners with industry associations to provide a number of insurance self-study courses and certification or professional designation tests, both in the U.S. and U.K. In addition, other insurance-related self-study programs are available for employees with costs reimbursed by the company.

### Online Learning

A number of self-study courses are available for employees online in the U.S. and U.K. These courses cover dozens of topics and skills necessary in today's workplace.

### Business training

Different businesses and departments offer training customized to employees in their areas through on-site trainers and self-study. In addition, computer-based training is available for all employees and provides Unum business, market and

product overviews. For example, U.S.-based employees have access to the Business Areas of Unum Central, where a number of training materials are available.

### Colonial Learning Center

Colonial employees have access to a comprehensive learning resource that provides online, self-study and instructor-led classes on business basics, computer skills and relevant insurance topics.

## TRAINING CONFERENCES

All U.S.-based employees in levels 12-14 are eligible for the company's annual Disney training and recognition conferences — BRIDGE, MASTERS, PARTNERS, SCORE and QUEST. Selected employees spend several days in Orlando for customer service training and team building.