

Platinum Award Winner

Step Two
Intranet &
Digital Workplace
Awards

An Award Winning Digital Workplace

How Liberty Mutual Uses a Digital Assistant to Support 50,000 Employees.



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Workgrid Software
LM Technology Group





Agenda



Background
Early Intranet to Digital
Workplace



JourneyFocus on employee experience



Tour & Outcome
An Intelligent DEX

Liberty Mutual at a glance

3rd largest property and casualty insurer in the U.S.

#75
Fortune Ranking
based on 2018 revenue

Property and casualty insurer in the U.S. 2018 gross written premium

50^k
Estimated Employees

30
Countries and economies around the world













Background

The year was

2013



Shift in Workplace... Cloud, Digitization, Pointed Apps

The technology powering the workplace was undergoing a fundamental shift



Early Intranet



Mobile

Wearables

Cloud Apps

Data Science

Social Intranet

Messaging

Video Conferencing

Digital Workplace

2010s

The Complexity of Workplace

Digitizing processes and transactions has led to enormous complexity



G Suite







servicenuw

















CHROMERIVER









Workplace Experience

ORACLE'

And From this Complexity

We Heard From Employees...



Missing Important Communications

Employees were frequently missing important announcements and time-sensitive reminders.



Delayed Approvals

Managers were losing approvals amongst other emails, blocking important work or requests from being completed.



Cognitive Overload

With too many systems for employees to use, key information and tasks were spread across multiple systems wasting valuable employee time and increasing frustration.



Too Many Login Screens

Many systems do not support Single Sign-On, requiring employees to manually type their username and password over and over.



Too Many Steps

If often took 10-15 clicks for employees to complete simple transactions like approving an expense report or timesheet.



Time Wasted Context Switching

Employees would lose valuable time jumping from one system to another to complete tasks or lookup common information.



Poor Perception of IT / Corporate Departments

With each corporate department buying their own best-in-class SaaS and vendor systems, it left a siloed impression of these groups.



Ignored Intranet Content and Communications

Information on the company intranet and other communications weren't personalized enough for employees to actually stop and read



Difficulty Finding Information

Employees didn't have a single tool to ask basic employee questions like "what is the time off policy?", "what's on the café menu?", or "how do I report a system outage?"

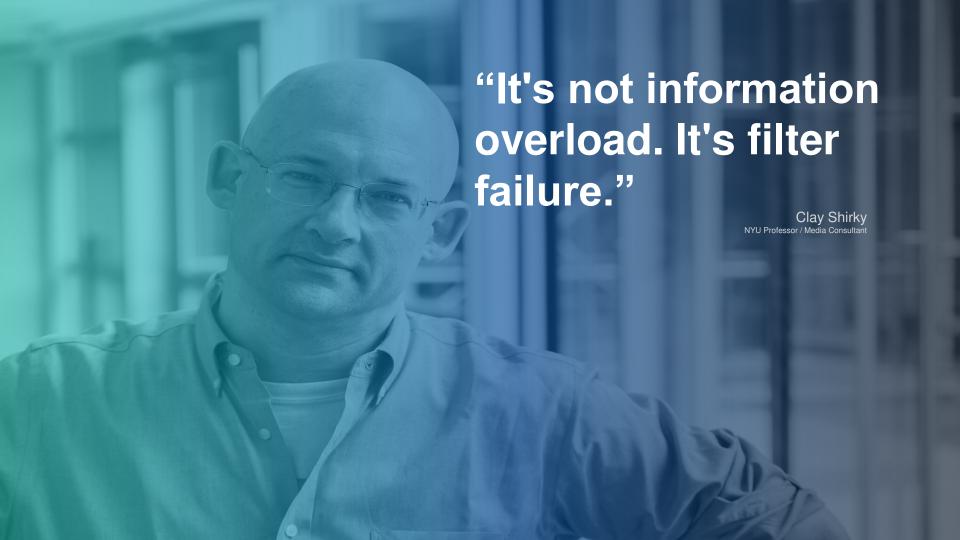


Complex Employee Experience

With no system to bring it all together, each vendor or SaaS product had a completely different user experience from the other.







Our Aspiration



"This completely changes our employees' daily lives."

77

Our Aspiration



"This completely changes the way you think of a <u>digital workplace</u>."

77

Our Aspiration

From:

"a hundred difference places to go"

To:

"A central digital hub – but also embedding the digital workplace everywhere"

VISION: Best in Class Digital Workplace Experience

Deliver employees with a personalized and engaging experience that enables users to easily access content, people, and streamline work processes when and where they choose, in order to improve their overall productivity by leveraging best in class technology.



Journey From idea to concept...

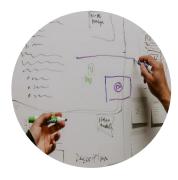
Software Development Shift











Design Thinking:

Journey Mapping Explore the problem

Lean & Agile:

Build the right things & build things right

Micro Services

Build the things differently

Research

Using design thinking principles to understand users and their pain points

Building Out Our Digital Personas



Carla
Customer Facing
Call Center



Roger
Customer Facing
Field Rep.



Admin Addy Office Professional Stationary



Connector Connie Office Professional Roaming



Manager Max Manager



New Nathan New Employee



"People call me day and night, all the time. That's how I get referrals."

Sample Roles

- Sales Representative
- Territory Manager
- Claims Resol. Spec.
- Underwriter
- Field Counsel

Tech Devices

- Laptop
- Surface Pro Tablet
- BYOD iPhone (w/ hotspot)

About Me

It's all about sealing the deal - I'll answer my own phone in the middle of the night if it means making a sale! I also work hard to develop and maintain relationships with agents in my region. They ask for a lot of policy reference material so I like to get that to them ASAP so they can follow up with their own customers.

My Experience/Goals

- I want to guickly and easily locate info for my agents and send it to them
- In the systems I use it's really important that I can tell immediately what is an FYI vs. what I have to take action on-and by when
- I need to get notifications about new leads as soon as possible
- If news is important, I expect that I'll hear from my manager at the weekly huddle
- I need to stay organized across 3 different devices

Pain Points

- Mobile experiences are sometimes inconsistent with the web version so I have to keep track of what's different
- So much content on myLiberty; it's hard to find info I'm looking for
- Search can be hit-or-miss
- I hate feeling like I am wasting time

EDW Tools & Me

- I rarely casually visit myLiberty; I usually am there looking for info for agents
- My team has a myConnections page w/ regional updates/alerts

Delight Me (Opportunities)

- More accurate search results
- I'd like to categorize myFavorites
- Help me stay organized whether I'm in the office, at work, in my car, at home, or somewhere in between (car dealership, credit union, etc.)

Connections/Relationships

- Agents / Customers
- Manager
- Colleagues

Field Employee User Journey At the office. At the office. On the road. Planned meetings. At home. Setting up meetings, scheduling Participate in team huddle. Traveling to visit Meeting with customers/agents Reviewing my notes, entering travel, sending emails, etc. customers/agents. in my region. data into systems, returning emails, calls. "If one page included every "A lot of planning...figure "[My Sales Associate is] "If we had devices that had Team huddle on Monday for link that we use here in out who you need to see. pretty essential to me being built in data plans, we'd get 30 minutes, 15 minutes on personal sales and we only Construct your 'milk out of the office...I don't Thu rsday. (P7, P/L Territory way more work done" (P7. had to go to one place to route" (P5, Lead Sales know how I could be out of Manager II) P/L Territory Manager II) find it..." (P1, Lead Sales the office as much" (P5) Representative) Representative Relaxing. Can Relatively relaxed Satisfying. Need to Nice. I'm not on reset in time, as I'm not on Helping agents reconcile my the road, so I between the road. Get to notes in Productive meet their + don't have to appointments come into the **Navigator** or time. I can goals. work a full office to prep for ___ system. Indifferent. return calls in nine-hour day (1 the week ahead. between day a week) Good to get info meetings. from manager, I get calls and Very tight Need to record schedule. Need to but I could be my mileage and texts while I'm have my notes. doing other driving but can't submit expenses Send follow-ups to Most important Annoved, Nice to things. respond, so (admin work) customers at the part of my job. be informed, but things can get a end of day if they "Want to do well by Need to print little delayed would like to hear need answers to the customers" anything I'll questions Wish I didn't news ASAP if need for the urgent instead of have to print Potential for next few days Hard to get things waiting until this Sometimes need to everything now Need to make sure wasted time, but done w/ laptop; until I'm back huddle pull over to make a my notes are that I'll need for it's also where I can other things hard w/ in the office. call or enter entered into the week. connect with my phone. Both are something on laptop. systems... things team and hear hard to use when Hotspot connectivity may get a little Annoyed. This Draining, Have relevant meeting face-face can be iffy. delayed waiting is work my to drive long Have to take updates/news. with customers. I don't have the until EOD admin used to care of things distances for time I need to do for me. meetings. my admin used rearrange Stressful. Trying to do. schedule if to coordinate If I forget anything Frustrating. something customers it slows me down. Inefficient. I unexpected around my travel have to enter I either have to Traffic stinks! My comes up. Aggravating, Can't schedule is wing it, or hope to info into 3 days are VERY get a solid VPN tough. different connect online tight. If I get connection. I can't systems. somewhere. delayed it cuts into get into ____ my time w/ system. customers. **Territory Managers** Sales Representatives Claims

Building a Business Case...

MVP Release 1 Scope

Function	Use Case	Business Value
To Dos	As a manager, I want to easily approve and disapprove items from various applications, in one place so that I can improve my effectiveness & streamline workflow for my team. * HR-Gateway * Remedy * iExpense * Time Mgmt * MCDC (Cornerstone) * BuySMART	 Mgr Time Savings Mgr Efficiencies Reduced elapsed process time
FYI Notifications	As an employee, I want to see notifications when my request has been taken action on (approved / denied / commented) * HR-Gateway * Remedy * iExpense * Time Mgmt * MCDC (Cornerstone) * BuySMART	 Mgr & EE Efficiencies Employee Engagement Reduced e-mail Timely notifications Reduced cycle time
Alerts	As a Manager, I want to be alerted when an approval is pending escalation to my Manager. As a HR manager, I want to be able to target and quickly send office alerts to inform and protect LMI employees * HR-Gateway * iExpense * Office Closure * Subscribe to alerts for other offices	Mgr EfficienciesEmployee safety & securityReduced e-mail
Profile & Personal	As an employee, I want to see my remaining FTO days and holidays for my location to better plan my upcoming time-off. * Personalized FTO Card * Year-End notification for potential loss of FTO * Holiday listing and FYI notification week prior to holiday	Employee EfficienciesEmployee EngagementReduced e-mail
News	As a PI or CI communications manager, I want to send targeted content based on demographics to better inform my departments and business unit * PI Newsweaver * Exact Target	Employee Engagement Improved Awareness
My Work	As a PI or CI sales person, I want to view my performance against targets so I know how I am doing. * PI Salesforce dashboard display Dept/Personal targets	Employee Engagement Improved Awareness

Scope 1 Estimates

Feature / Function	Benefits	Calculation Notes	Annualized Value
To Dos	Time savings since: Approvals can be actioned directly from the Digital Workspace Card 20 seconds per transaction and 30 seconds per login	 4 core approval systems 900,000 approvals & 600,000 logins 20 sec trx speed improvement 30 sec login improvement 5,000 managers \$67.50 Avg Mgr rate 	\$ 800,000
	Time savings since: Key Actions Items are consolidated into ONE list and outside of email. 5 minutes per week per manager	 4 core approval systems Reduced e-mail & no searching One-Stop location Assume 5 min per week time savings 5,000 managers \$67.50 Avg Mgr rate 	\$ 1,350,000
FYI Notifications	Time savings since: Key Notifications are consolidated into ONE list and outside of email. 1 minutes per week per employee	Reduced e-mail & no searching One-Stop location Assume 1 min per week time savings \$33.33 Avg EE rate 10,000 Employees	\$ 500,000
News and Business Metrics	Time savings since: Key Business Metrics (and News) are available in a dedicated Channel 5 minutes per week per manager	 4 core approval systems Reduced e-mail & no searching One-Stop location Assume 5 min per week time savings 5,000 managers \$67.50 Avg Mgr rate 	\$ 1,350,000

Team

Digital Workplace Organizational Model

Stakeholders/Steering Committee



Digital Workplace Organizational Model



Integrated digital workplace programs with an overarching vision & strategy have started to emerge as a route to delivering a cohesive employee experience and increased business value

- There is a need to create a team that becomes the glue that binds the separate parts of the employee digital experience together, it's own entity
- A team with a broadened view to develop and facilitate a vision of all workplace technology that presents a unified whole to the end user
- For the team to really have the mandate to effect significant change, it should ideally sit in an independent function....independent of Communications, Marketing, or HR



Program Portfolio Management (Steering Committee) represents the function that has the highest-level strategy and fiduciary decision making responsibility in an enterprise portfolio. The PPM function has responsibility for strategy and investment funding, program management, and governance.

Agile Decision-Makers



Product Management is responsible for identifying Customer needs. They own the Agile Release Train vision and roadmaps, pricing, licensing, ROI, and program backlog. They drive Program Increment objectives and release content via prioritized features and acceptance criteria.



Agile Program/Project Manager is responsible for "chief scrum master" essentially facilitating program level processes and program execution, escalating impediments, managing risk and helping drive program-level continuous improvement.













Product Owner is the team member responsible for defining stories and prioritizing the team backlog. The Product Owner is also a member of the extended Product Manager/Product Owner Team, understanding and contributing to the Program Backlog, Vision, and Roadmap.

Epic / Business Owners develop the business case, and when approved, work directly with the key stakeholders on the affected teams to help realize the implementation.



Agile Team of Teams

Program Backlog (Epics / Features)

Product Management Team & User Group Forum









Team Backlog (Stories)



Team Backlog (Stories)



Team Backlog (Stories)



Team Backlog (Stories)



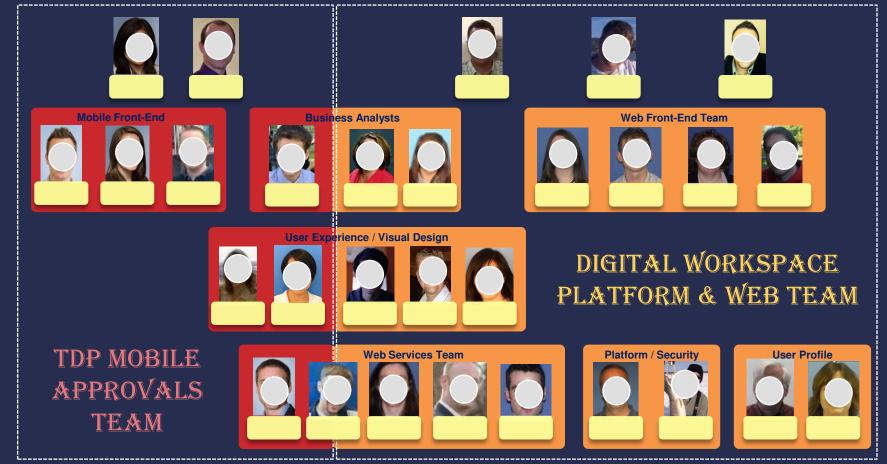
Architects, Technical Leads, UX, Communications





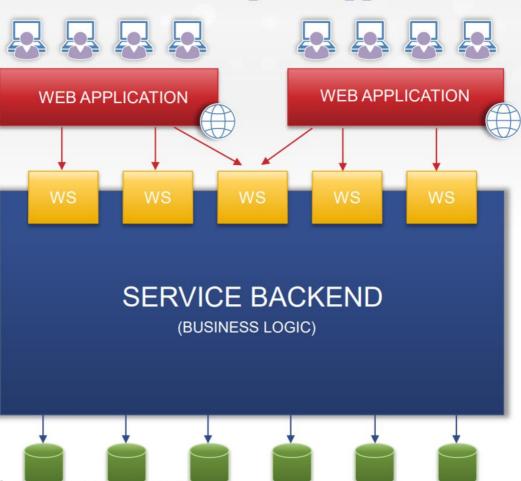


Our Team: A Unified, Global, Agile Development Team



Future-Proof Architecture

Traditional Enterprise Application - Challenges

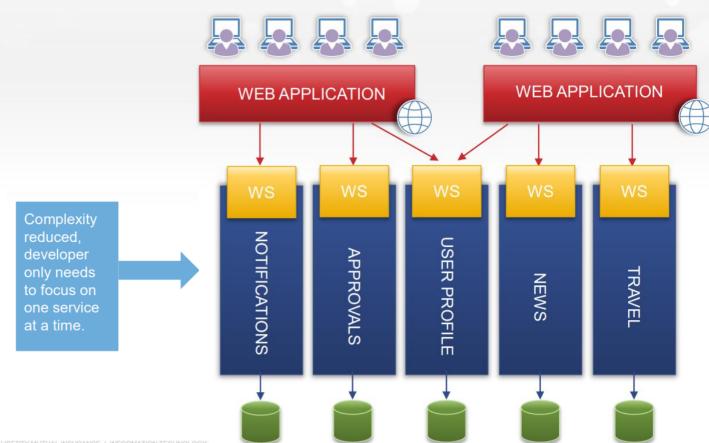


Challenges with the Monolith

- Large complex codebase (can be difficult for developers to understand).
- Slow IDE (need to build all code for it to work).
- Slow Deployment (a large single deployment takes long to deploy. Hard to do Continuous Delivery).
- Hard to Scale (you scale everything or nothing).
- Slows Teams Down (functionality-focused teams need spend a lot of time coordinating deployments and development)
- Long-Term Commitment to Technology Stack (Since all code is a single deployment, requires you to lock into technology stack, hard to mix different technology together)

Microservices

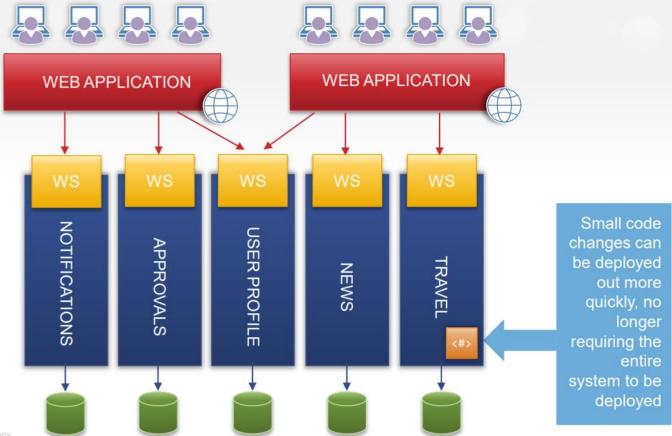
Breaking the Monolith into small deployable units based on functionality



LIBERTY MUTUAL INSURANCE | INFORMATION TECHNOLOGY

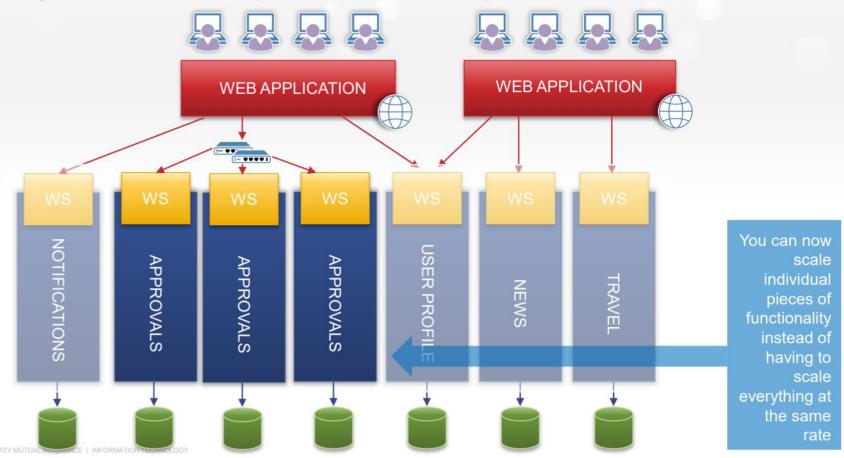
Microservices – Faster Deployments

Breaking the Monolith into small deployable units based on functionality



Microservices - More Efficient Scalability Where You Need It

Breaking the Monolith into small deployable units based on functionality





Working in Smaller Scale: Cards and Microservices















Back-end (Microservices)







APPROVAL

PARKING













Source **Systems**







Travel Data



Employee Data



Office / Real Estate Data



Management Data

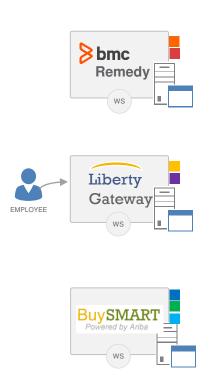
Creating Systems of Engagement

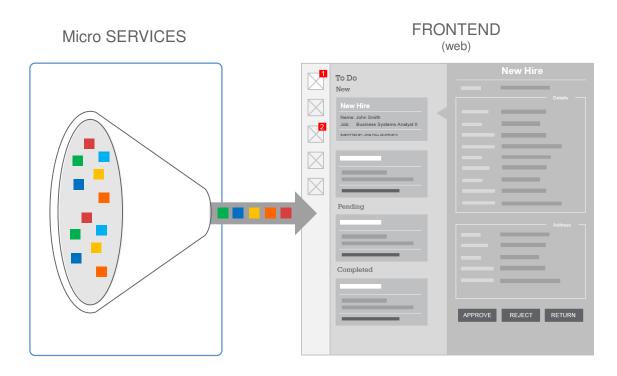




From Systems of Record to Systems of Engagement

Conceptually *events* fired within systems of record and processed by our service tier





Provide one place to go to view and manage work and information

Experience Layers Manage Complexity

So employees don't have to...







Digital Experience Layer





























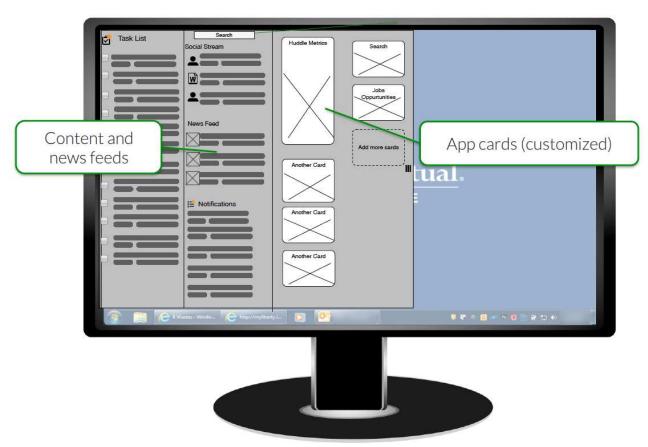




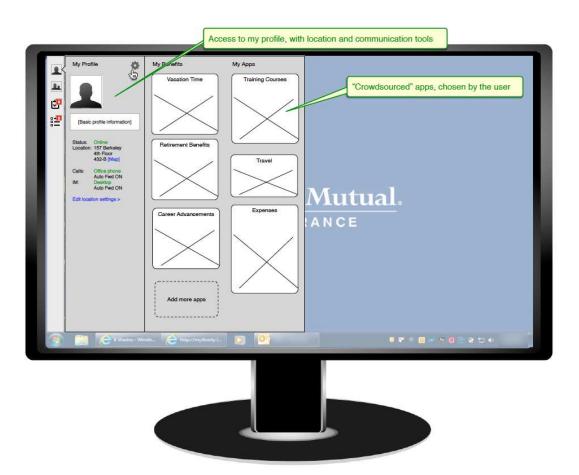


Prototype & Pilot

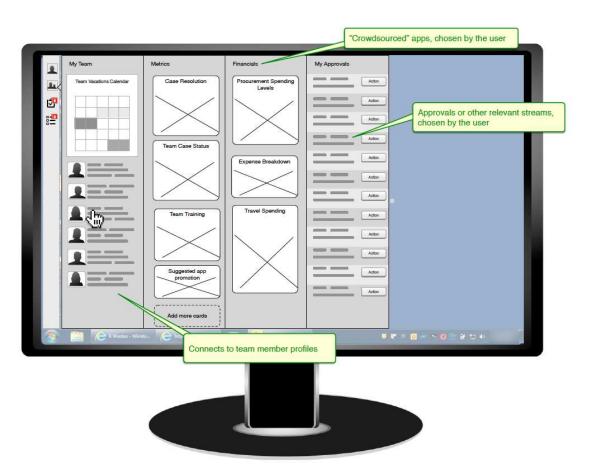
Prototypes-Initial Concept



About Me – Personal Information



Team Information



Team Information and Tasks

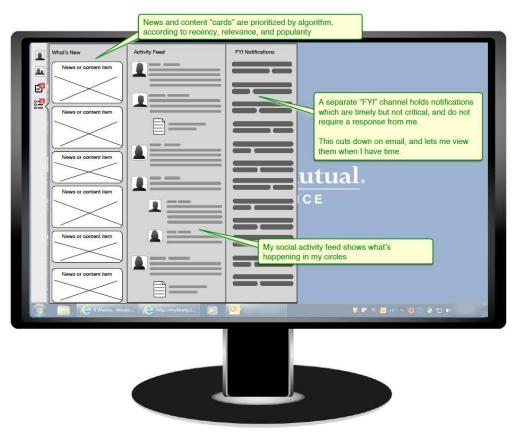


Personal Tasks



What's New

Aggregated Activity Stream and Notifications



Pilot

2015 – First pilot to managers was launched.
 Mobile application for approvals.

 2015 – Digital Assistant launched to beta group of employees as a toolbar on the Liberty Intranet



Video

Launched video with prototype and kicked off pilot group

"Love it! Makes it so easy to see everything I need to know:)"

LindsayBusiness Analyst

"I just want to say I *love* this!!!! I can't wait to see how it grows!"

DeborahMed Specialist

"This is *fantastic*... one of the most useful new liberty tools I've seen in a long time!"

Jordan
Business Analyst

"This is ALL kinds of awesome. Thank you!"

Gayle Sr. Training Specialist

Design Thinking Continued...

Ideation session overview

SESSION: myHub cards development

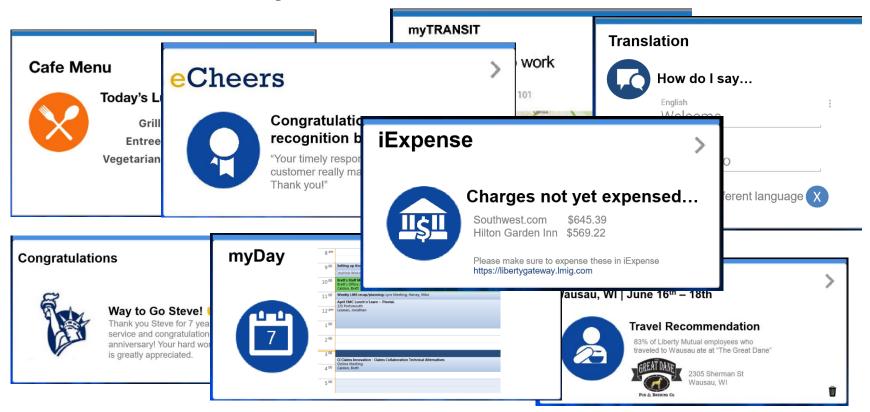
We are answering the question: How can we make employee's digital lives more "joyful" through "cards" in myHub?

We will work in teams.

Techniques:

- "The Wishing Game" Icebreaker and brainstorming session. Teams brainstorm as many crazy "wishes" as they can to answer the question above. Example "I wish we could have myHub tell me what my schedule tomorrow looks like and recommend ways to make my day more effective."
- **From wishes to ideas –** Teams will group wishes, then narrow them down to the top 5 ideas.
- Rapid prototyping Teams will use templates to sketch out what their cards will look like and what the cards will do.
- Storyboarding Teams will storyboard a day in the life of an employee and show how the card will interact in an employees "digital" life.

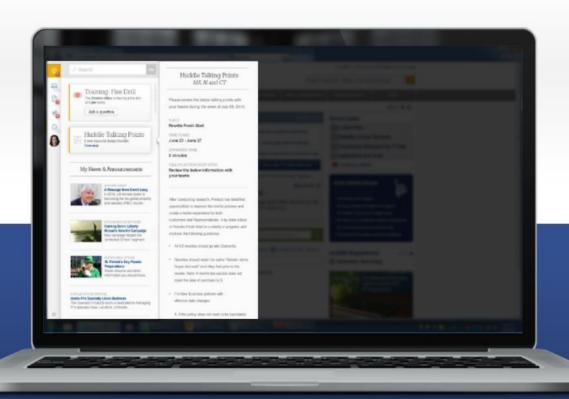
Ideation- What's in your Card?



Launch

The Employee's Digital Assistant

Bringing you the information you need, when you need it, and in the right context.

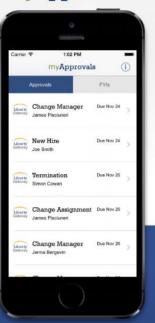


Web and Mobile

The Digital Assistant will be available from the intranet and approvals functionality on mobile



myApprovals



Intranet Web Application

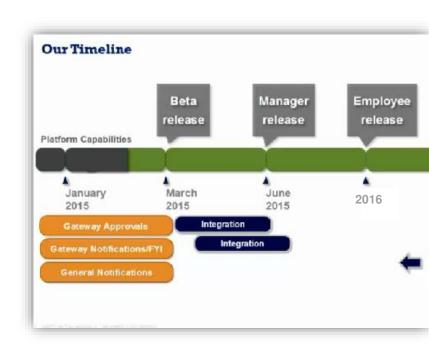
A Single Page Application (SPA) built to run within your web browser.

Mobile App for Approvals

iOS and Android native applications that expose the 'Approvals' functionality to mobile.

Time Line...

- Starting in late 2013, Liberty Mutual began work on what would become a digital assistant for the enterprise.
- In 2014, we iterated through prototypes of the tool and evolved the digital assistant based on employee feedback.
- In 2015, we released the digital assistant, starting a pilot to managers and later a pilot to employees...
- Early 2016, Liberty Mutual's Digital Assistant released to all employees...
- 2016- today... On going development, new functionality & systems added



Digital Assistant Tour

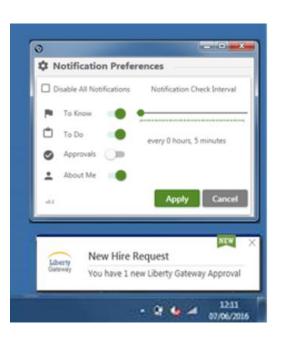
Digital Assistant Components



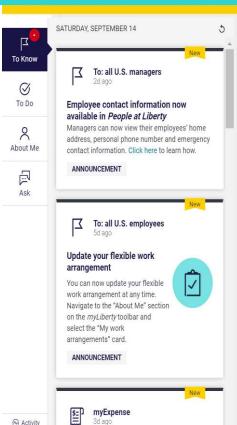
Intranet Toolbar

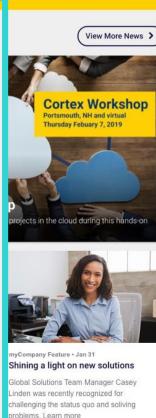


Mobile Application

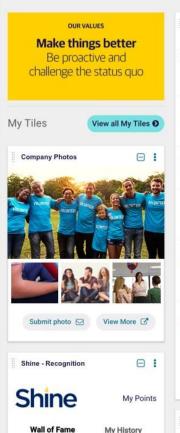


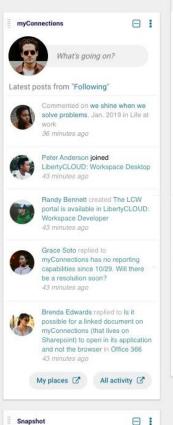
Desktop Notifier App

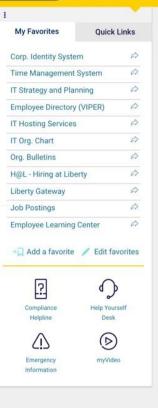




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Activity

: Settings

Expense Report 010001458094

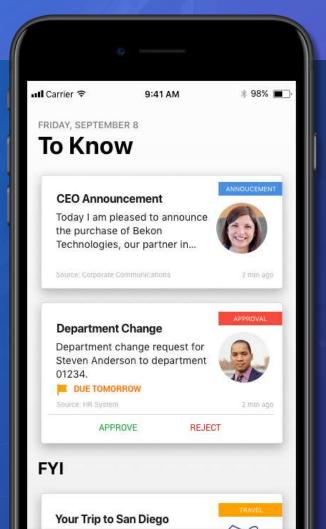
Smart Notifications



Unlike email, they expire (no need to manage / delete them).



Ensure employee has seen the notification before it archives.



To Know & To Do



Unlike email, they expire (no need to manage / delete them).



Ensure employee has seen the notification before it archives.



Elevates company and team information outside of email.



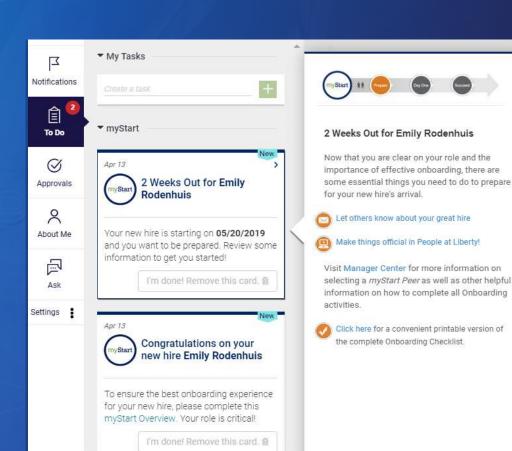
To Do

Aggregate tasks and approvals from across your systems

Highlight company or team tasks or due dates

Manage your personal or individual tasks alongside team or company tasks

Integrate with 3rd party task systems

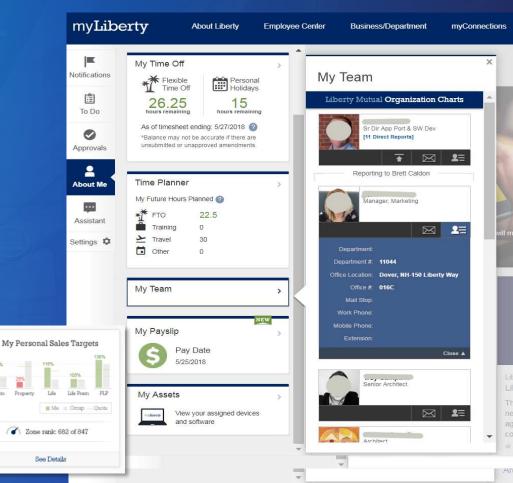


Microapps

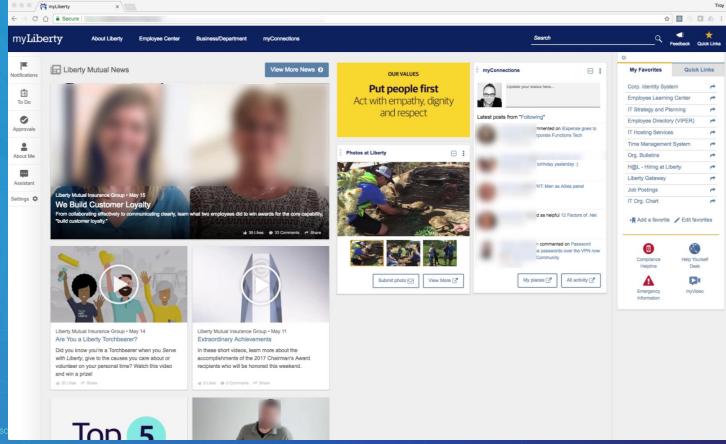
Persistent micro-apps that highlight important information from your work, employee systems, and more.

Changes and edits in the apps sync back to the source system.

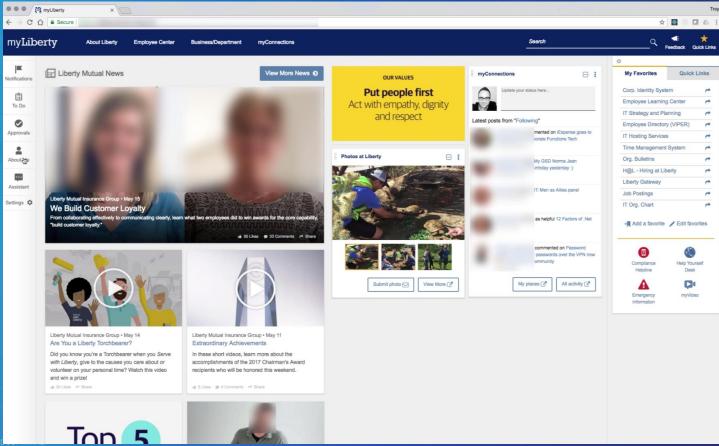
Reduce the need for employees to log into many systems.



Microapps – Viewing Time Off



Microapps – Editing HR Information



Microapps

Persistent micro-apps that highlight important information from your work, employee systems, and more.

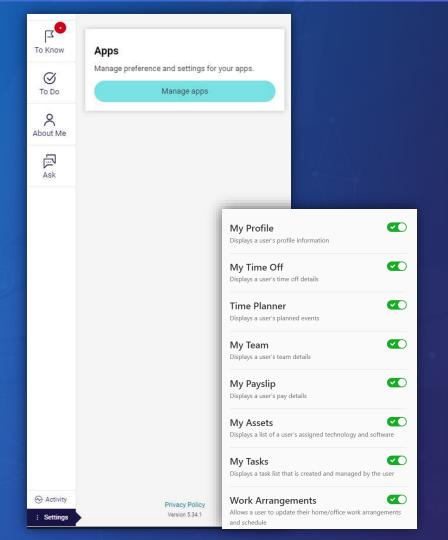
Changes and edits in the apps sync back to the source system.

Reduce the need for employees to log into many systems.



Tailored Options

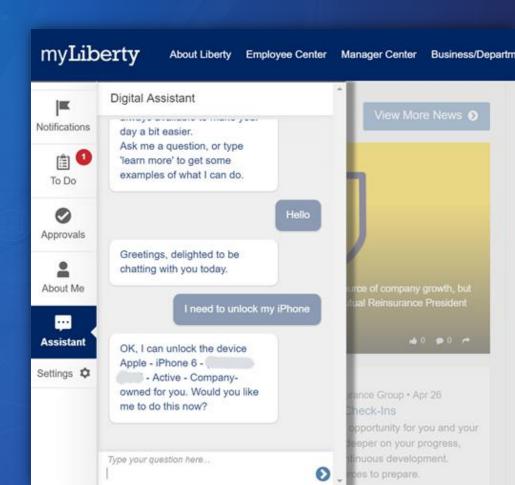
Settings enabled employees to choose which apps they wanted present within the digital assistant.



Chatbot

Chatbot added in 2017 to allow employees to obtain answers to common questions and complete tasks

Integrates with 3rd party business software and custom company applications



Search













Approvals



About Me



Settings :

Liberty Mutual News

View More News 3







From collaborating effectively to communicating clearly, learn what two employees did to win awards.



Liberty Mutual Insurance Group Tech Upgrades to Simplify Life

Three new enhancements toour digital technologies will make it easier for you to get the information that matters to you.

Liberty Torchbearers

Serve | Give | Volunteer

LEARN MORE

myConnections



Update your status...

Latest posts from "Following"



Jacqueline Ross joined Liberty Travelers 36 minutes ago

= :



Peter Anderson correct answer set Tropic Request for May 30th Tech Leaders meeting in USCM IT Technology Leaders



Randy Bennett acclaim_added USCM IT Claims - DNA: Zero Downtime Deployment with Rolling Updates in DNA Blueprints



Grace Soto liked Clancy's Tips & Tricks to a More Productive Workforce 57 minutes ago



Brenda Edwards replied Great Recent Reads in Liberty Book Club



All activity



My Favorites

Quick Links

Work/Life

- Benefits Express
- Liberty Gateway
- Time Management
- Work Life Solutions
- + Your Benefits Guide
- + Your Total Rewards

Career Development

- Shine Recognition at Liberty
- Job Posting
- My Career & Development Center

Support Tools & Resources

- Digital Policies
- + HR Support Center
- My Workplace Requests
- RequestIT
- Employee Services & Directory (VIPER)

Travel & Expenses

- → buvSmart
- Expense Reimbursement
- myTravel







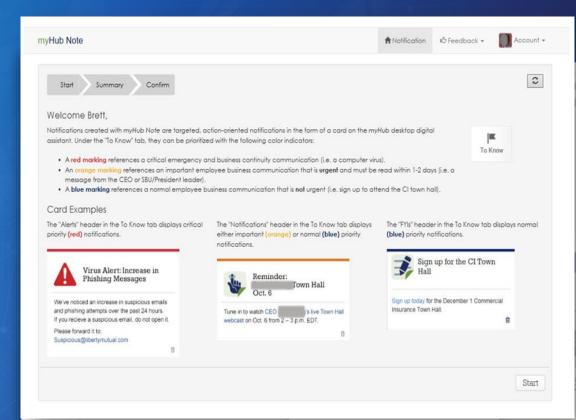




Communications & Surveys

Publisher ToolSend tailored communications to groups.

Survey Tool
Capture information from employees, take quick pulse surveys, and more.



Outcome

Benefits

Workgrid at Liberty Mutual



Simplified Consumer-Like Employee Experience

Less systems to deal with. Less logins. Less steps to complete tasks and access key information, employees loved it – a system employees actually enjoy using.



70% Fewer Clicks

70% fewer clicks to obtain key employee information, allowing employees to be more productive.



40% Internal Comms Increase

40% increase in internal communications click-through rates, employees no longer miss important communications.



90% Adoption Rate

90% adoption by managers, seeing 80% of transactions being approved in Workgrid instead of the actual source systems.



Reduced Impact of System Migrations

News apps are built on this platform, removing employee impact of switching to new systems behind the scenes.



Millions in Savings Each Year

Saving hours and hours of employee and manager time, and reducing costs at internal help desk.



Business Case: Smart Notifications

Overview

With smart notifications, Liberty Mutual consolidated approvals and notifications into one view outside of email. Approvals and notifications can be directly actioned from the digital workplace vs. the native system of record, removing the productivity burdens of context switching between applications.

Use Case	Calculation	Annualized Value	
Approval Time Savings Significant time savings per transaction to action approval (login & clicks)	(754,962 approvals) * (45 secs saved per approval)	Over 9,000 Hours Saved	
Approvals \$\$ Savings Reduce time managers spend on approvals	(566,221 minutes saved) * (avg. employee rate per minute)	\$639,829	
Notifications \$\$ Savings Move notifications outside of email and time spent searching	(5 min per week) * (50,000 employees) * (avg rate per minute)	\$6,720,000	



90% adoption by managers performing approvals in digital assistant vs native system.



5 minutes saved on average per week per employee



Millions of dollars' worth of reclaimed productivity.

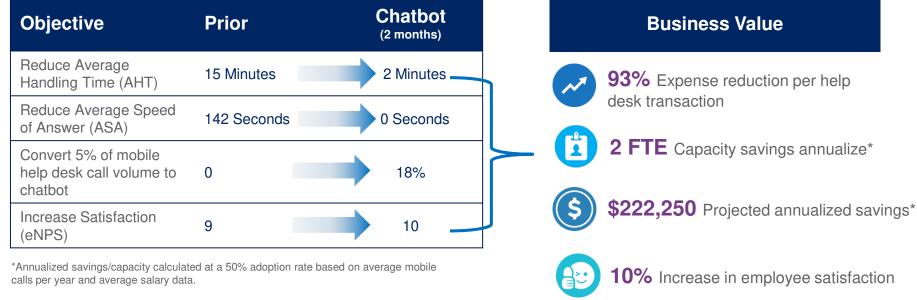


70% Reduction in number of clicks required for employees to obtain key information

Business Case: Mobile Help Desk

Overview

Liberty Mutual Insurance implemented a chatbot to drive efficiencies across its IT help desk and improve employee satisfaction levels. The chatbot was piloted to all mobile users for the following use cases: unlock phone, register/unregister devices, and sync calendar. After just two months, Liberty realized significant benefits and large ROI projections.



Workgrid at Liberty Mutual

The Employee Response to Workgrid (myHub) was Overwhelming!

The #1 word employees used based on sentiment analysis at Liberty Mutual to describe myHub was 'Love'.





Nancy

I love the new myHub - saves so much time by avoiding logging in to other programs. Everything is right there for you. If you haven't tried it yet, I highly recommend it!

1 Comment



Debi

I completely agree with you, I like the idea that all of your FTO balances are right there at your fingertips.

Like (0)

Report Abuse



Carla

Love the new myHub functionality!!!! Just got back from FTO and already used it to approve a BuySmart request in about 7 seconds versus minutes of separately logging in and clicking around. GREAT work!!!

Thank you!

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