

Name: Scottish Provident International Life Assurance
Size: Approximately 140
Sector: Finance
Location: Isle of Man & Hong Kong

The organisation

Scottish Provident International Life Assurance (SPILA) is a financial services company based in the Isle of Man, whose main products are offshore insurance and investment policies. It has undergone three changes of ownership in the last seven years following takeovers by Abbey National, Banco Santander and, most recently, by Resolution in September 2006. It employs some 140 staff across a wide range of functions, namely operations, finance, sales, accounts, investment administration, marketing and product development, actuarial work, buildings and facilities, compliance, business support, IT and human resources. liP status was gained in 1999.

The history of workplace dialogue

Workplace dialogue occurs through a wide variety of long-standing forums. The Staff Communications Group is a representative body that meets monthly, with elected members from each of the main divisions within the organisation. Questions can be submitted in advance and minutes are made available through the staff intranet. The Managers' Communication Group also meets once a month with an informal agenda to share knowledge on management across functions. There is also an Executive Quarterly Briefing where the corporate plan and strategic issues are communicated to all staff.

Within individual departments there are fortnightly or weekly team meetings where a range of issues are raised and discussed at a divisional level. Finally, there are the annual and quarterly appraisal meetings where performance needs and targets in the form of "what's" and "how's" are identified, discussed and agreed. In practice, managers have one-to-one meetings with their staff much more regularly than the formal quarterly appraisal, typically meeting fortnightly or weekly. Dialogue structures have altered in name, and in some cases in form, as ownership of the company has changed. However, the 'best practice' elements of systems have remained in place throughout the numerous changes in ownership that have occurred.

How are training and skills discussed?

Quarterly appraisal meetings between individual members of staff and their line manager are a key forum for discussing training and skills. A formal individual training needs analysis is conducted for each member of staff. This feeds into a personal development plan which sets out these training needs in detail. These

training needs are then assessed by human resources and co-ordinated into a coherent and achievable company-wide training plan.

There are also two specific workplace forums where dialogue on training is promoted. The Training Forum was established in 2004. It meets monthly and has 10 members, nominated by departmental colleagues. In addition, the 12-member liP committee seeks to ensure that the good practice promoted by liP is disseminated across and beyond the company. It also aims to ensure that the liP project is meaningful and constantly evolving. The voluntary decision to seek annual, rather than three-yearly accreditation, helps to ensure that the liP project is up-to-date and evolutionary in nature. The liP committee meets monthly, and project updates are forwarded to the board. There are clear linkages between the two committees, with discussions from the liP committee feeding into the Training Forum and vice versa. However, both committees have their own clear remit. The Training Forum reviews the overall training needs of staff from data provided through individual/departmental learning & development plans and evaluates training needs and outcomes. It also provides a framework and infrastructure for employees to develop, through the analysis of personal development plans and the compilation of the annual training plan. The liP committee drives forward the liP project and has its own budget. A key component of the work of the liP committee relates to training activities, but other issues, such as health and well-being and community projects, are also considered.

Together, these meetings and forums ensure ongoing, effective dialogue around training. Human Resources obtain answers to a range of strategic and operational questions: is training identified as a central business need? Should the training be formal? Should it be provided in-house or externally? The answers to these questions inform the annual training plan. For staff, these forums provide the opportunity to put forward suggestions and to contribute to debates about training. Minutes from the liP and Training forums are made available so that everyone can see how decisions have been reached. A training desk, set up during the quarterly executive briefings, a training and liP notice board and regular open days are key means through which training opportunities are communicated to staff.

A range of specific training initiatives and programmes have emerged from these forms of dialogue. The "Buddy Scheme", for example, emerged from discussions in the Training Forum and has resulted in the training of 10 staff from across the organisation to act as 'buddies' to new starters. Another form of training to emerge from the Training Forum was the delivery of the QualityComs initiative. A key issue identified by Resolution was the need for effective and consistent communication of information to policyholders. A number of staff from across the organisation who were in relevant roles were offered training in delivering effective presentations and in communicating a consistent message. These staff were then charged with rolling out the QualityComs initiative across SPILA.

A mentoring system, which emerged from discussions in the liP committee, is now being considered. Once this is established, staff starting a programme of

study will be allocated to a mentor with experience in that area. The liP committee was also the origin of dialogue which resulted in the provision of Spanish courses for staff following the takeover by Banco Santander. The innovative 'Trading Places' initiative, where different departments are twinned for three months, each attending the others meetings and team briefings, also emerged from discussions in the liP committee.

What have been the benefits from dialogue on training and skills?

- Turnover levels, which are relatively high in the Isle of Man, are low within SPILA. 44 per cent of staff have tenure levels of 5 years or more. Many workers have returned to SPILA after working within other companies on the island.
- Multiskilling has become increasingly important in the company. New owners have sought to increase the number of multiskilled workers, and multiskilling is seen by the company as a means of improving business performance. Training has led to improvements in multiskilling. For example, multiskilling within the operations department has meant that more staff have gained expertise across a range of areas, including processing application forms, activating policies and dealing with customer enquiries. The broad expertise across the operations has led to improved customer satisfaction and reductions in complaints.
- Effective knowledge transfer has helped to ensure that training has maximum effectiveness. When people return from courses they now routinely disseminate ideas and knowledge to other colleagues
- Regular evaluation through surveys has revealed high levels of worker satisfaction with training
- Skills awareness is much stronger as a result of dialogue on training. SPILA employees cover a wide range of occupational areas. The structures in place ensure that the training needs of all workers can be identified and met.

Challenges and 'top tips'

Multiple changes in ownership have proved to be challenging. The dialogue mechanisms in place have helped the company maintain a focus on training and skills throughout this change. For example, whilst the name and regularity of appraisal systems has changed with ownership, the best practice elements of these systems have remained in place throughout. Cameron Christie, liP Project Manager, argues that the liP project has provided a 'beacon of consistency' amidst all the change faced by the company.

Maintaining credibility is also challenging. Establishing dialogue structures is relatively straightforward, but employees expect to see deliverables in the form of training opportunities. This can be difficult in times of mergers and change, but

the structures established by the company help to ensure that training needs can be identified, implemented and evaluated effectively.

All training is assessed to ensure its relevance, and training decisions are governed by organisational level budgets. This often means that managers need to prioritise training. Amanda Stovold, HR Development Specialist, argues that a key challenge to effective dialogue has been to 'ensure that managers are able to ask the right questions and prioritise effectively'.