



TICP - Episode 59 – Strategy & IC: A masterclass in collaboration

(Season 7, episode 04)

[Katie 00:03]:

This episode of The Internal Comms Podcast is brought to you by the AB IC Health Check. This is a brand new, free online tool for evaluating your internal comms activities. Now, you've probably seen and used these online diagnostic tools before. Let's be honest, they can be a little lightweight, rather rudimentary, not always worth the effort of completing.

We wanted the AB IC Health Check to be genuinely useful. So, we designed it to be thorough. How does it work? The tour takes you through a series of questions in six categories: insight and understanding, strategy and planning, channels, content, measurement, and professional development.

Now, my advice is don't rush through these questions. Make time to sit down with a drink of your choice and work through your answers, you'll need a good 15 minutes. At the end, once you've entered your details, your bespoke report will land automatically in your inbox. This will give you an assessment of where you are today in terms of your internal comms activities. Plus, the report will be packed with insight, advice, and practical hints and tips for what to do next, whether you're ahead of the game, or just starting out. So, what are you waiting for? Head over to abcomm.co.uk/health. Get a free, fresh, expert assessment of your work and take your internal comms to the next level. That website address again, abcomm.co.uk/health.

Hello, and welcome to The Internal Comms Podcast with me, Katie Macaulay. Every fortnight I sit down with leading lights from the world of communication, business, and academia to tease out the smart thinking, fresh ideas, and new tactics for improving workplace communication.

This episode has been almost two years in the making. We've heard many times on the show about the importance of internal comms professionals getting up close and personal with the strategy of their organisation. So, for some time, I've been pondering whether we could arrange an interview with a senior internal comms practitioner and their strategy director. And what if these were two highly articulate, highly experienced professionals at the top of their game, working for an organisation going through major change and transformation? And, what's more, what if they were happy to openly reflect on the influence they have on each other and on how they manage and communicate change, and perhaps even to discuss what drives them on a personal level?

Well, my lovely listeners, thanks to Alana Renner and Nick Harding, we've been able to make that happen. Nick Harding is Chief People Officer looking after people experience and corporate



development at Canada Life UK. Alana Renner is Head of Communications and engagement at Canada Life UK and reports directly to Nick.

Both have had rich and varied careers, Alana in all aspects of communication at some well-known UK organisations, including The Prudential, National Savings and Investments, the Post Office, Avon, and now Canada Life. Nick has had an impressive career at Canada Life working in sales operations, corporate development strategy, and is now leading people experience and corporate development at the organisation.

A quick word about Canada Life: the company was actually founded in 1847. Today, it provides insurance and wealth management products and services in Canada, the Isle of Man, Germany, in Ireland through Irish Life, and in the UK, where it employs around 1,500 people.

We cover a lot of ground in this show. Listen out for Alana talking about moving the organisation from, in her words, 'PDF to person'. I love Nick's answer to the secret of his career success, and how not being like everyone else in the room can actually be a superpower. Alana and Nick explain why they use the phrase "blended" rather than hybrid working. They talk about the various mechanisms they use for listening to their organisation. And Nick explains the secret to real and lasting corporate change. And that's just for starters. So, let's get cracking. Here's Alana and Nick.

Nick and Alana, welcome to the podcast, in person as well, which is very kind of you. It's lovely to have you here.

[Alana 05:37]

It's fantastic to be with people and doing this together. So, thank you.

[Nick 05:42]

Yeah, absolutely.

[Katie 05:43]

Nick, let's start by understanding a bit about Canada Life UK. We've got listeners in over 50 countries for this show. I'm guessing the ones in Canada and North America probably know your business pretty well. But, for everyone else, can you just share a little bit about the financial services you provide, where you operate, and the sort of size, the scope of the operation, particularly the number of employees? I think that would really interest listeners.

[Nick 06:09]

Delighted to, Katie. Canada Life, it's a global organisation, clearly where we have a big presence in Canada, we also have presence in the US through Empower and Empower Retirement. And we have a



European business, as well. Irish Life in Ireland, and a German offering as well. I'll talk a little bit about Canada Life UK. We've been here for a good number of years now. We primarily focus in on insurance in financial services, group insurance - we work a lot with employers across the UK in providing protection and life insurance, critical illness policies, to them. We're fairly well known also for providing annuities across the UK. And we also have a wealth management offering, which really focuses in on what we call international bonds.

So, we have offices in the Isle of Man, we have offices in Dublin, and we also have a permanent base in Hertfordshire. We have around 1,500 colleagues across the UK, operating in those business areas, primarily in Hertfordshire, but we also have offices in Bristol, in London, and the Isle of Man and Dublin offering themselves back into the UK.

[Katie 07:23]

Talk to me about your route into the business. Obviously, you've got this current role as Chief People Officer, but you were telling me that also includes strategy. So, yeah, you can obviously mention your early pop career. I'm very happy to bring that in.

[Nick 07:41]

Thank you, Katie

[Katie 07:43]

Start where you'd like!

[Nick 07:45]

For sure. Okay, I started work at Canada Life UK, actually, 20 years ago, I joined in 2000. It was on the back of a perhaps not successful music career. Perhaps we'll save that for another day. But I came in initially working in the customer service areas, I became quite fascinated about the role that we play in financial services with customers. It was on the back of acquisition with a lot of acquisition as a group in the company and I was quite fascinated about processes, inefficient processes, ensuring that customers that we work with are treated in the right way. Perhaps on the back of a slightly broken pop career if you, like my parents, are very keen to understand where I might go. I moved into sales and worked in sales and marketing for a number of years. And then an opportunity came to join an accelerated Leadership Programme across Europe for accountants and for actuaries, neither of which I am, but I managed to persuade them that this musician may serve a role in Canada Life and I was lucky enough then to work throughout the UK.

I've worked in all of our offices: Bristol, London, the Isle of Man, Dublin and the UK, and in the last five to 10 years done a lot more strategic-type roles. So, I will often get involved in acquisition, integration of organisations, a lot of transformational change in the last few years. And this is when I got to meet

Alana. I was leading the transformation programme, part of the transformation team for the UK. I was driving that, which was a lot of organisational change, looking at the operating model for the business and really reshaping the organisation focus, and we needed very strong communications. We set up a communications office to drive continuity of the messages across the UK, which is when Alana came and worked with me. Around six months ago the opportunity to lead both the strategy and the people agenda was presented to me and I was appointed to the role of Chief People Officer in June last year looking after strategy and people.

[Katie 10:07]

I can't not ask you after that: all the roles that you've done, and it feels like you have obviously said yes to lots of opportunities that have come along, you've gained experience, gained seniority. I was just simply going to ask you, what's the secret to success of having a career like that? I don't know if that's a question you feel you can answer. But looking back on that, is there some advice you might give others who are just starting out in their career and think "My goodness, me, I'd love to emulate that kind of career success or journey."

[Nick 10:41]

Constantly curious, I would probably say in everything I do. I'm not one for the day-to-day, if you like. I do like to look in and make a difference. I like ambiguity. And I think that's probably not for everyone. But whatever role I did (and it wasn't necessarily financial services), when I entered in, I needed to make a difference. And there's always an opportunity to be curious, to make changes in organisation, to ultimately do a better job for the customer and the shareholder. And that's really driven me. Probably, my wife would say, an obsessive personality and lots of effort, but I was determined that regardless of not being necessarily a traditional financial colleague in this organisation, that I could play a role or provide a different lens. And that's probably been the secret: is always challenging that status quo, if you like, and being prepared to try things new.

[Katie 11:48]

And when you say "attracted to ambiguity", are you saying there when you see something that doesn't quite add up, or there might be a problem, you're actually drawn towards it rather than away from it?

[Nick 11:59]

I see it as an opportunity, yes. And that can be scary. But there's often the opportunity to figure it out, if you like, to learn from what the ambiguity is showing, and what that scenario is showing you. And that's something that's - I've always found that I'm less uncomfortable with. People are more uncomfortable than I. So, how can I help people through that ambiguity?

[Katie 12:24]

Alana, let me bring you in at this point, because you've also had a very rich and varied comms career before joining Canada Life. And I know you've had responsibility for both internal and external communications in some very well-known organisations. So, in terms of employee comms, marketing, media relations, can you touch on some of those roles? It's probably impossible to touch on all of them. And just talk a little bit about what you've enjoyed most? And why?

[Alana 12:52]

Yes, indeed, well, we won't talk about my failed pop career, either, which I think maybe is something Nick and I connected on in our first interview in this building. But maybe another day for that one, as well. So, communications, I mean, I joined an insurance company, funnily enough, and very quickly moved to working in the city with that company, on a transformation and change programme. And communications was very, very early on in its evolution phase, really, from an internal perspective, and worked with a wonderful communications director, who when I said to him, "I don't like your communications very much" he said, "Well, then you do it." So, it all went from there, really. And from being that cocky 20-something, I've stayed in change communications. I have done PR, consumer PR through to CSR, through to, you know, working in some really tough environments where change and broadcast communications could be very tricky as well. And what do I enjoy most? I love, again, I suppose, helping make a difference. Helping stakeholders connect with the organisation in the right way, and helping to build the right reputation as well, whether that's internal or external, I think that the same kind of approaches apply in many instances.

[Katie 14:39]

We've already talked a lot about change and transformation. And I know even before the pandemic, Canada Life UK was undergoing quite a significant change programme. Can you tell us a little bit about that transformation and what it involves?

[Nick 14:53]

Yes, of course, Katie. We've grown through a lot of acquisition in the UK and that served us very well. But, as a result, we've had a number of businesses that in their own right have grown and become market leaders. So, our group insurance business is market-leading, our annuity business is market-leading, our wealth management business, parts of are market-leading. However, we are also a traditional life company that have, as many of our competitors have, under-invested in technology, haven't necessarily always been the most agile when it comes to change. And the way that we ran our organisation probably acted in silos. So, really the heart of transformation has been to create really one Canada Life, a real opportunity to bring together one common view of our customer, one common platform for our IT infrastructure, one common voice for our colleagues into the organisation. So that's the opportunity.

We have weathered well in growing some of our core product areas, and we have an opportunity to become a much stronger proposition end-to-end, really catering and looking after the financial lifecycle for our customers. And the whole driver of transformation has to really bring us closer together to allow us to be, if you like, a companion for our customers end-to-end across the value chain of financial services. And that's the heart of what we're driving here. And where I was leading is that real change to the structure of the organisation to get one set of processes for finance and risk.

[Katie 16:33]

Ah, right. Okay. Okay. Bring everything together. It's interesting when you talk about breaking down silos because I hear that phrase a lot. It's almost like organisations wish they could become greater than the sum of their parts in a way. Yeah, I think, what role does communication play along in change and transformation? You said you've had a lot of experience of change and transformation programmes, have they found you? Or have really looked for those kinds of roles secretly?

[Alana 17:06]

It's such a good question. I think partly, I've looked for them, certainly as I become more experienced. If you ask the 24-year-old Alana if that's what she was going to do, she wouldn't have known what change or transformation really was. But I think I was lucky enough to move into that kind of strategic area quite quickly on in my career. And it's certainly something I think I thrive in, in terms of helping the organisation and working with the organisation to cut through some of the complexity, and to bring the sum of the parts, and I sometimes call it doing the knitting, or maybe it's the weaving together to create something that adds up and working and influencing in the businesses in different ways, and with programmes that have different objectives as well. I think clarity of objective is really key. What are we trying to achieve? Why are we trying to achieve it? And then how are we going to achieve it, is the plan. So they're some of the questions I think that we ask, as communications professionals to try and help the organisation put those things together.

[Katie 18:28]

Can I ask you a bit of a sneaky question? I've always thought that that is absolutely right. And often when we do that, we are, unbeknownst to us, potentially finding gaps, missing pieces of the jigsaw puzzle that other people haven't necessarily seen or worked all the way through. So, we think we're just adding clarity. But actually, sometimes we're doing something even more helpful than that. Would that be fair?

[Alana 18:57]

I think so. Yes. And then I think it's about: how do you bring that back? How do you provide that view back as well. And I think having a view and providing, you know, the listening mechanism for the business as well to say, actually, we might have a gap, we've spotted a gap there, and this is a gap in people's understanding as well, that we need to we need to fulfil and need to help people with. So I think there's a

number of different lenses on those gaps. Yeah. The other thing, on the flip side, Katie, I think we find sometimes is there could be lots of stuff going on, and I'm sure some of my communications colleagues from over the years. Hopefully, this will resonate with, but there's stuff going on that you say I can't see how that ladders up, so why are we doing it? Yeah, I think it works both ways.

[Katie 19:56]

Yeah, that's a good point too. Nick, at the moment, as the Chief People Officer, you've got Alana, her IC team reporting into you. But as you said, before that when we were just looking after strategy alone, Alana was still reporting into you, you had that Communications Office, what was the rationale at the time for having IC sit within the strategy function?

[Nick 20:19]

Quite simple, really Katie. I described that there were a number of parts of our organisation, generally, it's driven by acquisition. So, we had an internal communications team in Bristol an internal communications team in the Isle of Man, internal communications team in London, etc, etc. What we needed to do is if we were going to really drive a consistent message and one set of narrative to really bring the organisation with us through transformation, we needed the central communications office to drive that. And that's where I think I did come and find you, Alana would be fair, your reputation precedes you. But we needed to really drive the right narrative and understanding into the organisation consistently. And that was the original driver for that strategy office and dedication is at the heart. That's carried on and continued, and thank goodness we invested in the communications team ahead of the pandemic. I remember Alana and I sitting daily in the boardroom in Potter's Bar, pre refurbishment, listening to Boris, thinking: when are we going to lock down? When are we going to lock down? And Goodness me, then we'd have conference calls? Do you remember them? You know, to let leadership know. So thankfully, we had we had experience of Alana driving the communication strategy at the beginning of the pandemic. And thank goodness for that. But it's actually helped us mature as an organisation. And it's been interesting watching our employee colleague surveys over the last two years, it may not be dissimilar in other organisations, but the recognition of the investment in communications, internal communications, has really risen through the organisation, which is credit to the team. I think people have needed to hear and understand what's happening during lockdown, and we've invested in a lot more channels as well all driven by Alana and the team. So, it couldn't have worked out actually better in terms of the timing, but they were the original reasons for the transformation, the need to bring different elements of the organisation together on the one consistent narrative.

[Katie 22:38]

Alana, there are debates always, I've heard them over the years, you know, where should internal comms report into? Is it a corporate comms function? Is it marketing? Is it strategy, etc, etc? I'm just wondering, what are your views generally on report lines? Do they matter at the end of the day?

[Alana 22:56]

Well, I think that I and the teams that I've worked in, have probably reported in everywhere now. So, direct to the Chief Exec, into strategy, into marketing, into HR, or people experience as we call it here at Canada Life. And I don't know that it does really matter. And I think it's guided by: what is it that the organisation needs to achieve? And where is it best achieved from? My approach to try and work with the organisation, that means collaborating and connecting in the right ways at the right time, and helping people see why you're asking those questions, and what you want to achieve as well.

[Katie 23:42]

That's a really interesting point, actually, which I don't know why I'd never thought of before. But if you are an IC team reporting into, for example, a finance director, and you would think, well, that's terribly odd. You're right, there might be a reason why for that moment in time for that organisation that is the best place for you to report, or HR or whatever it is. So yes, it's not just about where I would like to be reporting in as an IC person, but what's right for the organisation and what it's trying to achieve.

[Alana 24:12]

Yeah, and I think from a communications perspective, corporately, whether it's internal or external, it's the ability to have the view across the business. And it's, it's up to you, I think, how you make that work, but bringing all of that together, I think it does depend on the business.

[Nick 24:34]

The other fundamental, I probably just follow up, was the listening of the organisation as we go through significant transformation to be fundamental and that's what the IC team under Alana done for us, is that finger on the pulse as to what is happening in the organisation so that we can react, and that's been really, really important.

[Katie 24:55]

So spill the beans, is there ever a point of tension with it? You're trying to achieve something strategically, and you know, IC want to go off in a different direction or a challenging in a certain way. This is where you get to sort of bear all about how it works, or do you always see eye to eye?

[Nick 25:15]

Oh, no, right, the beauty of the relationship is I can, I'm sure at times, sit in a strategic bubble and Alana will bring me back to reality of how we should be thinking and executing. So, I think there has to be, but that's really important that we come at it from both angles, right? There is a strategic ambition that is fundamental. And there is also what we have said to the organisation, how the organisation is feeling about, how do we do that? And I'm not saying for any minute, that doesn't mean that the IC team have not got a strategic lens, of course they do. But there's very healthy dynamic, I would say. Alana, please comment.

[Alana 26:05]

Yeah, I think if you don't have that ability to be able to hold up that lens, I think, then it's very difficult to do your job effectively. Because what I'm really keen on is that we are measuring how we are doing. And we're measuring the right things to either be able to chart progress or spot when we've got an issue.

[Nick 26:29]

I think I'd say also, whether this is a Canada Life UK issue, I'm not sure. But we've certainly had a very conservative approach in how we communicate, very corporate approach. And from the get-go, that has not been the style of our communications. And it's been very healthy. I think if you if you were to look back a couple of years to the approach that we would take, to the personality now that we have in our communications, and that constant driver from Alana and her team to actually be more authentic, and really be true to what we are doing and be less of that corporate voice stuck in the boardroom. That's a big change that we've seen in the last 24 months.

[Katie 27:21]

I think lots of people would like that Alana, I get taught me about how you make that work, then that authenticity, bring it alive the wall, is there any sort of any particular Secrets of Success?

[Alana 27:31]

Okay, so there's something about being human isn't there within an organisation, I think, particularly through the pandemic, where being human became so important. And actually, if I think about Canada Life, and what's right at the heart of what we're here to do business for what we're here to do for our customers, and the role that we play through various different life stages, we've really got care at the heart of what we do. And yet, there was a, there was almost a mismatch in terms of tone and approach, which you felt when you walked around the floors. In the days we did walk around on the floors. But yet, we were being quite corporate spouses. So, I think it's important for people to come through and be a human.

[Nick 28:26]

Yes. And perfectionists, we were awful perfectionists. And you've told us actually, it's better just to say-

[Alana 28:32]

Yeah, there's a lot of perfectionism. Yeah. So it used to be quite difficult to sign anything off. And I think in the first six months, I think I took the challenge as: be moved from PDF to person, you know. And we did that, I think, you know, we brought human stories in through the pandemic as well, things that people were doing for each other, but also for our customers as well. And they're the things that kind of warm you as a human being day to day. So it was, it was really about bringing that through, I think it was there, we amplified it.

[Katie 29:11]

But what you're describing is lovely because it's the method and the message being the same. So the message is "we care, we're human, we're there for every stage of your life". But then communicating that in a warm human way just amplifies the message, it makes it more believable. Presumably, the big strategy question that often gets asked by communicators is when to go with something? Should we wait for every t to be crossed and every eye to be dotted, before we can let the world know? Or is it better actually, because things by osmosis tend to spread around organisations quite quickly, actually. Is it better to say something rather than nothing? Even if that thing is "we're going in this direction, I can't tell you a lot more because we actually haven't got all the answers yet. But I'll let you know when I know more"? I don't know where you stand on that one.

[Nick 29:38]

I think, I think certainly a couple of years ago, particularly when you're making big decisions, decisions that affect the organisation decisions that affect the people in the organisation, it's very hard to not want to be a perfectionist to try and cross every t so that that corporate approach is meant with heart and there's reason for doing it. But I think increasingly, I'm learning, actually, it's better to talk better to share what we can earlier. That certainly has been one of the many things I'll take away from the last two years of a pandemic, that the longer you say nothing, the more you can be, you know, it's better just to move better to talk. And yes, and there are many different scenarios, situations, I had a situation recently where we were going through a restructure, and it felt like the right thing to do there was to hold back to keep it very sterile in your communications. But, actually, it would have been much better in hindsight to be a bit more authentic and a bit more honest and talk a bit more quickly.

[Katie 31:13]

Right. Okay. Okay. I've got a sort of timing question for you Alana, as well. When do you like to be invited into the conversation about the strategic challenge? And that doesn't necessarily need to be a big change programme. Anything strategic? Can you be invited in too early I suppose is the question?

[Alana 31:33]

Can you be invited in too early? I think, again, depends what it is and what you're trying to achieve. So, there are some elements I think that it's okay to be brought in midway through, because it will have started to form, and you can start to input into what's happening. But then sometimes it's good to be there right at the start to be asking awkward questions. There's other times answering that, why, what and how, and helping to shape, because I think you can influence very effectively and constructively. So yeah, I think it's: what is it that you're trying to achieve? And there are some challenges, where, over the years, it really has been important to be right there at the beginning. And I can think of some great examples that I won't bore everybody with just now. But it's other times, you don't need to be right there at the beginning,

[Katie 32:40]

You use the influence word. And that comes up a lot with IC practitioners sort of early or midway through their career who would like to be seen as more influential, more as a business advisor, I suppose, to their senior stakeholders. Is there a way that they can develop the ability to become that, to build their ability to influence? How do you do that? I know, it's a tough question.

[Alana 33:06]

It is a tough question. I mean, there is definitely the understanding what the business challenges are, understanding the leaders, what's on their mind, what's keeping them awake? And working with them to help alleviate that and find a way through. And you know, sometimes leaders need you to be asking those questions, or there saying, how about this? How about that? And I think mostly these days leaders are very grateful for having that support. So, I would say, understand, creep around in their shoes a bit, understand their perspective. Don't think you've always got all the answers as well, because not one size fits all.

[Katie 34:04]

Have you ever had a leader that you've thought "my goodness me, I'm gonna have to, you know, dig deep to build a relationship with this person"? And if you did, how did you do it? Are you comfortable talking about an experience like that?

[Alana 34:19]

Nick's looking at me going "don't say me". No, it wouldn't be Nick. I think that if you work in communications, public relations, corporate affairs, tight roles, you've probably got something in you that that means you connect with people. So, I think I find myself very lucky to have mostly worked through 20 odd years in those types of roles, getting along with people but taking a bit of time to try and understand. I would actually say that sometimes maybe I haven't gone in enough, and sometimes I've held back. And I think sometimes maybe you need to grapple with that and maybe talk to somebody or get a bit of coaching and say: why am I feeling like that? And then try and open the conversation, but mostly I've got on with people. And there is only one person that I can think of that I've worked with in my career where I found it almost impossible. But sometimes you've just got to say we're just not going to work well together. And then you have to find out, well, we're just gonna have to do this, but we're not going to work well together.

[Katie 35:45]

And not dwell on it. Actually. Yeah, because it's the exception that proves rule, really. So you've used the phrase blended working to describe the way employees will be working in the future. And that seems like a deliberate choice, as opposed to hybrid working, which is what I hear more often. Can you talk a little

bit about why you're using blended if it is a deliberate choice of words, and the sort of comms approach you've taken to kind of establish new working practices across the organisation.

[Alana 36:16]

We chose blended because it feels more connected, I think. Over the two years that the pandemic we took the opportunity to refresh, redesign a couple of our office buildings. We've not finished the programme yet. But we have enabled those buildings to be a blended workspace as they were. So we've removed offices, there are no offices, nobody has an office anymore. In these two buildings. We have put in collaboration areas where we're encouraging teams to work together across functions, giving them the space to do it, what were offices are now small meeting rooms, so that people can actually work virtually and in-person together. So, I think that's where blended more than hybrid has derived from, I'm just looking to Nick to see if he wants to add to that, but it was not as black and white as either or. And I have to say, we are still opening up, we're in a testing land scenario, we're rolling out a piece of work at the moment where we're asking colleagues to come in, talk about our purpose, and our direction of travel for the business, in the long term. We're putting a heavy emphasis on asking people to come into the office to do that, because we believe that that's better. If we do it together in person, it's great opportunity to connect people across teams as well. So, we haven't gone black and white on this, we're very much listening and learning.

[Nick 37:18]

I support that entirely. I think it's been fundamental that we don't dictate ways of working. And we really learn and listen and understand how we want to work as an organisation. And we have to respect and trust our colleagues to work that out. There are many colleagues that have benefited from from working from home, there are colleagues too, that really miss working in the office. And I'd really like us to get to a place, and we're so lucky that we've had the opportunity to do this refurbishment programme over the last year and a half, that we have a brand-new office with new ways of working that feels far more inclusive. But we really want to understand how to best use the working environment. And I don't think anyone's been in the position yet to fully understand what that looks like. Because we're only just moving into whatever new normal might be, so blended I think is a lovely choice of word. That's because hybrid feels a bit more, up and down left and right if you like, whereas blended is, this this could be a complement, how we want to work and can mean so many different things. And that's what we want. As Alana says, it needs to be a watching brief, we need to understand how the organisation learns, how do we really connect as an organisation in a new world? And we might have to make revisions as we go. But let's be as open to this as we can as we go on the journey.

[Katie 39:27]

Do you foresee any particular challenges as we head further into 2022, and this does become, this is not going away as you say, this is going to be the way we work, I imagine, going forward. Are there any

particular challenges you can foresee? And maybe you're experiencing yourself by running your teams in a blended way?

[Nick 39:46]

I think it's so hard when you've adapted to a Teams environment, Zoom or whatever, these constant meetings, to then come into the office, only to realise that you're sat in a meeting room all day on your own, you know, these are live challenges that we need to learn through, technology is going to be fundamental. But I think we just, for me, it's been, let's not move too quickly so that we put people off, it needs to almost go slowly and bring people in, otherwise they can come in for a day, realise that they're going to be in the middle of the room and the technology doesn't work, on their own, and they go home again. So yeah, because I do think it's fundamental that you have that connection and organisation that you have the face-to-face time to really come together. But we need to work that out and bring that in, in a way that works for everyone. Certainly, our recruitment strategy has changed over the last two years, we're bringing in people from a far wider pool across the UK than we would have done previously. When are people going to want to be in the office? How are they going to work? All of those considerations need to flow out a little bit. It's a great time to be a Chief People Officer and really work through these different challenges.

[Katie 40:58]

Yeah, I can imagine. There's a lot of ambiguity. I mean, the question I suppose I get asked, and I don't have a good answer for it. And it's unfair there, therefore, for me to ask it to you, is culture in particular, you know, how do you develop a strong culture when people are essentially most of the time sitting in their spare rooms or at the kitchen table?

[Nick 41:20]

I don't know if I can give you an answer other than in a very different way, we've learned to connect in new ways. And, so, there's all these things that we can take from the way we've been the past two years, that we have to take into the new world. That culturally, you know, we are being more accepting of people's flexibility to work, to take their kids to school to take time out, go to the gym. That's wonderful. We should, we should keep that. And at the same time, that that connectivity in person is missing, so that's why blended is such a wonderful word here, actually, to bring, bring the two together to really understand our culture going forward.

[Katie 41:59]

Yeah. Yeah.

[Alana 42:00]

I think that's right. I mean, one of the concerns that I think more than just Canada Life has is about how do we make sure we're not excluding people by having a blended working approach as well, because

there is something that we think about when it comes to visibility and presenteeism and those water cooler moments that you get when you're in a building scenario. Or the fact that you can sit near somebody and just shell over and say: what's the answer to that? Plus, you're in when you're in an office environment, you're picking up things that are going on around you, which you don't get when you're sat exactly at your table in your kitchen, your dogs barking? I don't think we know the complete answer. But we're really working on trying to bring that both in person and virtual piece together.

[Katie 42:54]

Just out of curiosity, has listening, and new feedback mechanisms played a role in trying to get under the skin of that or do you have good listening and feedback mechanisms already that you're using?

[Alana 43:06]

When we started out on the journey of reimagining our workspace, which is programmes, we called it we did reach out to colleagues to say, if you could imagine being in a world where you don't have to be in five days a week, you know, what would it be? How often do you think he would want to be in that physical environment? Now, that was a little while ago. And at that point in time, it's two to three days. Now, still, it's two to three days. I think we've moved on a little bit from that in that, is it a whole two to three days is the question now. Because we can work from home too. So I'm not sure if this answers the question, really, Katie, but we have listened. We do continue to have dialogue. We have an employee consultation forum. So this morning, we were asking them questions about where people, what questions they're getting, what feedback they're getting. We haven't formalised to the point where we're saying, every quarter we're going to do a listening exercise. What we have done through the two, two and a half years, is when we have wanted to ask a question, or when we felt, actually we're getting some signs here. We need to ask the question, then we would go to the organisation.

[Katie 44:32]

Did you set up the employee consultation group or was that already established?

[Alana 44:37]

That was established, yeah, that was set up for the transformation programme.

[Nick 44:43]

Yeah, given the significance of the changes that we were making. We set up the consultation forum to consult. It's fantastic, it's become a great place to really understand, be back in the organisation and how people think.

[Katie 45:01]

Do people volunteer to be part of it?

[Nick 45:04]

It's completely voluntary. And they can be elected to be part of that.

[Katie 45:09]

How often do they meet?

[Nick 45:11]

We met this morning, actually, we're normally every month together and discuss a wide range of topics. And it can be quite informal as it was.

[Katie 45:21]

Nice. Nice. Now, I've noticed that you've had a nice three new senior appointments recently, I think maybe some more. But since we spoke Alana, a few months ago, you've got a new Chief Executive, new Chief Operating Officer, new finance director, and am I right in saying they're all women? Is this true?

[Nick 45:38]

We're delighted to welcome in and appoint Lindsay Rix as our new Chief Executive Officer, August last year. And we also have a new Chief Operating Officer Caroline Dibbs, who started in November, I believe. And we have a new CFO joining us in April, this year, Steward Robinson. And I think I'm the other new appointment to the executive table. It's a new team, and a new chapter of Canada Life, if you like. And it's been wonderful to onboard and communicate and work with Lindsay, Alana has led that as we bring her into the organisation. And that's been an opportunity, actually, because some of the channels that we've used are very new to how we would have done things previously. I'll let Alana talk about that.

[Alana 46:27]

We have adopted Yammer, which is part of the Microsoft suite. And I know that lots of people listening to this will have done that and had various experiences, I think we were a little bit, we have no idea how this is going to go. And it has gone amazingly well. And, so, you know, it is the channel we can guarantee we can get eyeballs on. That's been new, fairly new to us, and seems to be working well. And we have a small number of communities that are set up, including our colleague-led groups, so our ethnicity network, and our sustainability group they're using those channels very well. Also, we did some stuff that you might have done in person back in the day and introduced coffee and chats with no agenda, completely agenda free with Lindsay with Caroline and others are starting to do those as well. So it's basically grab a coffee, whether you have to make it yourself at home, or you can have one in the office and we just sit around and chat. That's another way of listening. It's an informal way of listening. It's really powerful, I think.

[Katie 47:38]

Yeah. Nick, do you have any sort of tried and tested approaches that you used when building a relationship with a new senior colleague, let's say, or stakeholder however you want to describe it?

[Nick 47:52]

Tried and tested? I'm not sure Katie. It was really important that as the key strategist for the UK, and now People Officer, that I develop that relationship with the CEO, I think that relationship is a really important with the perspective that I can have? It was a challenge because we were in a lockdown situation. But no, I think we've adapted, time, openness, transparency has been really important. For me, I think I had a fundamental role to provide some of the the background as to why as we move into transformation, and that allows Lindsay to be a guiding hand in there where we go to in terms of what next so, I just think personally I'm a very open and honest individual. Canada Life in the UK, isn't a political company. That's one of the reasons I'm still here are 20 years on, is that there is authenticity in this organisation and honesty. And that's a really important part of any organisation for me personally, then you can trust those that are working with you.

[Katie 49:06]

Alana, when we spoke last year, we're talking about becoming a truly responsible business. And that being a real imperative for the organisation. Why is that? And what are the first steps on the journey to becoming more responsible?

[Alana 49:24]

Well, this is something that I'm truly passionate about and something that we are working on with focus in Canada Life, it's an imperative for the business. Well, I think we've all got a responsibility, whether that's a personal responsibility, as an individual on your day-to-day, responsibility as a citizen. But as a business, we've also got a massive responsibility and businesses can make a big difference. And they are going to make one of the biggest differences, aren't they? Let's stand back from this. We're not, you know, I won't get political, but I think that's why it's important, and particularly through a business such as ours, where what we do helps people have better futures, secures better futures, there is a responsibility for us for this business for the long term. And it is something we want to do.

[Katie 50:27]

Right? Are there any particular programmes or initiatives you're kicking off right now? Are you in the design phase of that? What does it what does it look like in practice?

[Alana 50:36]

It's really interesting, because we've got a lot of passion running through from colleague led groups. Okay, so I mentioned our ethnicity network, they're an amazing bunch of colleagues who are really working with us, and we support them to work next, yes, interested during through diversity, to bring through inclusion to bring through dialogue to work with the organisation to make it a better place.



That's really amazing. We have a sustainability group who have done that. And I think where we're at at the moment is putting all of those pieces of the great work together, and pulling it into driving it strategically, with purpose. And for the long term of, you know, good of the business, our communities, and you know, our colleagues as well.

[Katie 51:33]

Yeah, it's interesting to step back a little bit from this business and look more generally. And you're right, we don't need to get deeply political. I mean, every year, the Edelman Trust Barometer, I don't know if you know, that big survey of trust. And it's 33,000 people they interviewed, trust and credibility of institutions, like governments, the media, business, in general is through the floor. But people are now hoping for and wanting CEOs, in particular, and their own employer to step up. And they're more likely to trust them to do what's right, their employer to do what's right. I don't know, if you've got any reflections on this Nick, about whether that actually puts businesses in the spotlight to do the right thing more than anything else.

[Nick 52:15]

Oh, there's probably a couple of angles I take on this. Katie. The first picks up on a point that Alana made, is we both work in financial services for a reason. We believe in the role of financial advice in the financial security and the role that we as an organisation play in that and that's fundamental, and there's more we can do that, you know, I do worry about people in later life, I do worry about financial security, I think this is these are issues that are just waiting to happen, and what can I do to help that, so that, to me is fundamental, I think there's a real opportunity as an organisation to be at the front foot in how some of the next generation is coming through, we're thinking about their financial security in the future, and we play that role. The second is, absolutely as a business, we have a fundamental role in society. And certainly for Canada Life UK, there is more we can do, and we are challenging ourselves hard, both as a UK organisation, but as a global organisation, as to what we can do to be a more responsible business. The third area, I'd say is, as well as all of that, if we're going to be an attractive employer, and we're going to attract talent into the organisation, this is a must do. It's more demanding than ever for employers to attract talent and to retain talent and to develop talent, and particularly, I think, for some of the younger generations that are so: what is the organization's purpose? What is the organization's mission? How are we doing?

[Katie 54:02]

Yeah, absolutely. It's all part of the employee experience and why someone would want to join and stay basically.

[Alana 54:08]

Yeah, absolutely. I mean, that that's fundamental, isn't it to all businesses, I think,

[Katie 54:15]

Yeah, I think we're seeing lots of surveys where CEO number one priority is attracting him. Nick, I think listeners would love it. If you don't mind, a little peek inside the mind of a business strategist. Can you tell us a little bit about what might be commonly misunderstood about crafting and implementing business strategy? Or, and or conversely, what maybe the keys to success are?

[Nick 54:39]

Not sure if it's misunderstood, but I would say you know, there are many strategists around, it's all about whether we can execute, and I may pick up on another question that you would have around what are the key to delivering lasting change into an organisation? I think it's critical during a time of change, for the engagement of the organisation to understanding why you were doing what you were doing, and I will refer to John Kotter and influencing change. It's true today as it was 15 years ago, when I first read it, the need to really make it clear as to why you were doing what you were doing. So to get the buy in, to drive that, to really bring in people around you that you trust, the guiding coalition I think John's referring to, and the need for system engagement. And the piece I think that we forget sometimes and Alana's very good at reminding me, celebrate the small wins, as you're, you know, looking to deliver strategy and you go through that make sure you, you come back to those small wins, and keep going and celebrate the successes of the journey.

[Katie 55:48]

Those are the proof points, aren't they, the things that maintain momentum? Yeah. So let's end on a really critical question. Before we get to those quickfire questions, if you've got time for them. I'm guessing all, you know, senior HR people at the moment are facing some major challenges. If there are, I hope there are, plenty of IC folk listening at the moment, and they want to better support their HR or talent, people, stakeholders, Alana, Nick, any advice you would give listeners at the moment sort of better support those stakeholders.

[Nick 56:23]

Some of the key challenges for the HR functions at the moment are all around the environment that we're in, they've been driven by, you know: what is the future of workspace? And what does that mean? And that's going to be fundamental, it's not going anywhere we need to work it through. And certainly, you know, our internal communications and engagement function are heavily involved helping us understand that and to drive that. I'd say the war of talent, you know, the 'great resignation', what is happening, it's a real, you know, there's such an important pivotal role to play to really engage with our colleagues across the organisation, to understand, because I think people can move so easily now, you have to almost embed a culture into an organisation in a very new way. The role of internal communications is fundamental. In doing that,

[Katie 57:14]

I'm going to change the question for you slightly Alana, because you and I have worked with each other for a long time over many, many years. You probably can't remember how many IC folk have reported into over all those years, but it's a lot. This is another tough question, but I can't not ask you it. Of the people you've seen over your career at all levels, and all experiences and all different types. Is there certain traits, attributes, characteristics of those IC folk who have sort of progressed and those that haven't? And that's a really tough question, but we're getting down to the nitty gritty. And, I don't know, do you feel able to answer that question?

[Alana 58:00]

So I think that the most successful are those who have sought to understand what they're trying to achieve, what the business is trying to achieve. And that's a bit of a repeat of my answer previously, but I think that's fundamentally true. And bringing the human and authentic touch through is really important. Not being scared to have a bit of fun along the way. And also, there's something about planning and delivering. Because we can all talk a good game in communications, we've got to be able to plan and deliver as well, and then respond. It isn't working. Respond. Don't keep ploughing on ahead.

[Katie 59:01]

Right. Okay. So adapt. And when you talk about delivery, it's exactly what Nick's just said, you can have a great strategy, but if you can't actually deliver it, it's not a great strategy, is it? It's only on paper. Let's ask you these quickfire questions if you've got time for them. What do you both wish you'd known when you first started out in your careers?

[Alana 59:26]

I think I have to say a bit of advice would be patience. I think: patience. And listen. Because sometimes when you're in your 20s you think you think you've got all the answers. I think I did on occasion. I have to say, I look back and I go, there are some moments where I thought: I'm lucky to have survived that one. So yeah, patience, listening, and I think the other thing is: work with a mix of people. Don't work with everybody that's like you. Because you're gonna learn much more, much, much more if you're working with different perspectives, different people, different styles and experiences.

[Katie 1:00:26]

Yeah, like it.

[Nick 1:00:28]

If I look back, I guess I would try and give myself that reassurance that it's okay to be different. It touches, I think a little, on what Alana was saying is that, as a young individual that had come up through music, entering into financial services, I spent a lot of time questioning: why am I here? And it's not about necessarily the organisation you work for. It's what you bring to the organisation. And I think we are in a better place now with recognising the diversity and the importance of diversity of views and

talent around a table. And I probably should have worried less. At that point, I found I was constantly fighting a battle, if you like, do I belong? Which may have driven me, to be fair, to keep going. So I wouldn't change that. But I just think we all have a role. And we all bring something different. And that's okay. And believe in yourself.

[Katie 1:01:27]

It's interesting, because when you were speaking earlier, and you were talking about your career, and you not being an actuary, for example, or an asset manager, it almost seemed like your perspective, you were using that as a bit of a secret weapon, because you were actually looking at things through a different lens to everybody else.

[Nick 1:01:47]

Absolutely. And I think, you know, whatever route we take coming into organisations, whether it's through university or whatever other aspect, I think it's all relevant, and use that to your advantage and have faith in that.

[Katie 1:01:59]

Yeah. So to Nick, first, what book, it could be anything, it could be a website report, it could be people sometimes mention films, what would you recommend all internal comms people should see or read to better understand business and business strategy?

[Nick 1:02:17]

I'd go back to the book I referenced. Yeah, I would go back to John Kotter. It's, it's a book that's been around, but it has the core principles, fundamental principles of leading change in an organisation. And even if you just read through the nine principles of that change model, I would, I'd recommend that it's read.

[Katie 1:02:35]

Perfect, thank you. Alana something that all I see folks should read, to better understand communications?

[Alana 1:02:43]

To Kill a Mockingbird. I've said it a couple of times, I think it's about creeping around in people's shoes and understanding their perspectives, but also read that book and learn from it that there are different perspectives. And there are ways to challenge and there are ways to change. I've read it a number of different times with different lenses and at different points in my life. There's always something new and relevant in it. And I believe that that's helped me.

[Katie 1:03:15]

Nice, nice.

[Nick 1:03:17]

And I'm gonna come back and said, I said nine steps, but there's eight steps. Now I feel like a complete fool.

[Alana 1:03:23]

You're not an actuary though, are you?

[Katie 1:03:25]

Well, it's a nice circular argument. So, finally, in this show, we give all our guests a billboard, a bit of a metaphorical billboard for millions to see. And you can write on that any message, you can literally put anything on that billboard you like. So, what are you going to put on your billboards?

[Alana 1:03:48]

Might be a bit cliched, list them off, speak.

[Nick 1:03:55]

Maybe I'd go cliché as well. But at a time of when we're leading change is being the change that you're that you're trying to lead. So, holding yourself accountable and leading by example.

[Katie 1:04:07]

No. Yeah. Guys, thank you so much for appearing on the Internal Comms Podcast.

[Alana 1:04:13]

Thank you.

[Nick 1:04:14]

Great, thanks.

[Katie 1:04:18]

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