



# Maximizing the value of each employee with individualized performance management, feedback, and learning paths

Assurance creates value by minimizing risk and maximizing health for over 6,000 businesses and individuals across the country through a suite of insurance solutions, including business insurance, employee benefits, financial services, private insurance and surety.

Assurance’s culture is purposefully employee-centric. Yet the insurance brokerage’s existing performance management tools didn’t align with a commitment to ensuring employees, not just clients, felt individualized. “Employees felt our previous performance process was repetitive and it wasn’t focused on their individual goals relating to development and performance,” said Katie Dykstra, human resources manager at Assurance.

The company’s commitment to employee development was also hampered by outdated tools. “As we grow, we need to be able to offer training across geographies, which is complex unless you have instructors at each of those locations,” said Dan Passananti, SVP of business process and learning at Assurance. “We didn’t have an LMS. There was no easy way to report on compliance. And our content didn’t have a home—it didn’t live anywhere.”

Assurance was looking for a solution that would enhance their culture, instead of replacing it. Cornerstone helped to facilitate Assurance’s “DNA” performance management process, which stands for Dominate, Navigate and Appreciate.

- RECRUITING
- LEARNING
- PERFORMANCE

**Industry:** Insurance  
**Region:** United States  
**Employees:** 500  
**Live Since:** 2014  
**Business Impact:** Ensured scalability to accommodate growth; streamlined compliance reporting; created a centralized place for all learning content; enabled documentation of frequent, meaningful feedback; set the stage for development plans; maximized the value for each employee with a focus on individualized performance management





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- Michele McDermott, senior vice president of human resources, Assurance

## Why Cornerstone

Assurance implemented Cornerstone Recruiting, Cornerstone Learning and Cornerstone Performance. "I knew that Cornerstone could be configured to meet the needs of a small HR team and accommodate the company's 12% percent growth rate. With Cornerstone, you can make your talent solution anything you want it to be. The sky's the limit," said Dykstra.

Assurance is committed to investing in its people. "For us, Cornerstone was an investment which allowed us to provide every person at Assurance an experience that's as unique as them," said Michele McDermott, senior vice president of human resources at Assurance. "As we expand our business and add new members to our team, we know that Cornerstone can grow with us, and help us maintain and continue to refine this amazing employee culture we've built."

Today, the team also applauds Cornerstone's intuitive interface and comprehensive customer care. According to Bethany Stripp, talent system specialist at Assurance, "As an administrator, it's an easy-to-understand system. I have access to so many resources—the Success Center, CSM experts, Office Hours, Online Help." The team also attends Cornerstone quarterly meetings to share best practices with other users. "I love that I have a network outside of my organization that wants to help me," said Katie Tarpey senior human resources generalist at Assurance.

## The results

**Ensured scalability.** Although the insurance brokerage could have selected a talent platform designed for mid-size brokerage, Assurance wanted a solution that would enable growth. "We definitely thought about scalability.

We're expanding across the country and have four more offices opening in the next five years," said Dykstra.

**Streamlined compliance reporting.** Previously, reporting on continuing education (CE) credits to maintain licensure was a manual, time-consuming process. "Cornerstone's flexibility allowed us to add a custom field for CE credits. Now reports are easy to run and upload to the state," said Passananti.

**Improved feedback process to boost day-to-day performance.** Before Cornerstone and the DNA Performance process, performance conversations at Assurance were often difficult. Now, with a new feedback process in place, managers say they feel more empowered to have frank, honest conversations. This updated process has helped employees to know where they stand and they look forward to receiving feedback to improve their day-to-day performance.

**Created a centralized place for all learning content.** "With Cornerstone, people can easily digest content on demand in one place and in a very self-directed way," said Passananti. In 2017, Assurance had more than 9,000 hours of training logged in the system.

**Set the stage for succession planning and career pathing.** Previously, review data was saved, but not leveraged for analysis. Now, that information is used not only to drive learning and improvement, but also to plan succession. "When overhauling our performance process, we wanted to ask questions that opened a discussion around performance and development goals," said Dykstra. "Furthermore, we are leveraging the reporting capabilities to have a bird's eye view into the current performance of our people and their readiness for progression."



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