

How The Advocator Group's leadership team utilized PI to design a winning talent strategy

Background

The Advocator Group is a nationwide advocacy firm that helps people apply for and receive Social Security Disability Insurance (SSDI) benefits.

Laden with red-tape, the process of applying for SSDI benefits can take three years or more. With approximately 80% of Americans living paycheck-to-paycheck, the application process can feel isolating, impossible, and dire.

Luckily, that's where TAG comes in, and more specifically, the client advocates (CAs) serve on the front lines to guide TAG's clients through the intricacies of the claims process.

The Challenge

While the CA role is an essential and ultimately rewarding one, employees find it's not always easy to interface with clients who are in the midst of adversity. Because of that, turnover began to increase.

The increase in turnover prompted three members of TAG's leadership team—Julie Turpin, CEO; Michael Shunney, president and COO; and Holli Sannito, director of human resources—to look for a solution.

"Often the CA role is a hard one, and it can be taxing because you're dealing with people who are in really tough situations, and often, they think it's our fault that they're not receiving their award," Holli said. "Because the CA is the client's initial point of contact, the CAs deal with a lot of that initial pain from the claimant, and we know it takes a special type of person who can be successful in that role."

Holli, Julie, and Mike knew they needed to build a behavioral profile for a successful CA. Initially, they searched for a pre-hire assessment tool, but ultimately, they chose to partner with The Predictive Index—a platform that allowed them to view their organization holistically through a talent optimization lens.

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Holli Sannito - Director of HR

The Opportunity

The leaders first used PI to improve their hiring and recruiting practices. By creating behavioral profiles (Job Targets) and administering the PI Behavioral Assessment™ to candidates, TAG was able to:

- Improve CA retention through the first 90 days
- Exponentially reduce the time recruiters spent interviewing candidates
- Improve the overall candidate experience to ensure they were attracting top talent.

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Having seen first-hand how PI’s people-data driven insights catalyzed change in their hiring and recruiting strategies, Holli, Mike, and Julie decided to explore how to further utilize the platform for maximum business impact.



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Holli Sannito - Director of HR

“One of the things that matters to us is leveraging our investments,” Julie said. “So, we started thinking, OK, we’ve got this tool. We’ve made this investment. We like how it works. We like the results. We like the efficiency. Are there other use cases for it in our company? And we realized you don’t have to look very far to find other use cases.”

With 2019 planning on the horizon, Holli reached out proactively to her PI consultant to understand how they could potentially leverage PI’s people insights in their strategic planning. Inherently, Holli knew that mobilizing TAG’s people and leadership team around key strategies would be critical to the initiatives’ success. She also knew that results improve when a leadership team is moving in the same direction and workstyles are aligned with business strategy. So when her consultant

recommended the entire leadership team take the time to align on and codify their business strategy so they could strategically design their talent strategy, she was all for it.

They started with the PI Strategy Assessment™, an untimed, free-choice, stimulus-response tool that captures a senior leadership team’s perceptions, agreement, and confidence regarding their business strategy. The tool documents an organization’s business strategy and expresses it in people-centric terms so everyone’s clear on how to execute.

All members of TAG’s leadership team took the short assessment, providing input about what strategic objectives to pursue and how confident they felt in their ability to achieve each priority. Once the results were in, the leadership team met with their consultant for an Execute Strategy with Confidence session to align on strategy and map the leadership team’s behavioral competencies against that strategy.

As Holli put it, “Taking the PI Strategy Assessment sort of opened Pandora’s box for us. It helped us to identify some gaps in our strategy, and also to point out things that we believe existed but weren’t certain.” Through the strategy assessment and leadership workshop, TAG discovered that their team had some different opinions.

Given TAG’s business model, this made sense. As Mike said, “Our business strategy is, first of all, to continue to grow organically in our core businesses, but also to diversify into different adjacencies that involve what we do in service of our clients. Last year, we helped people receive an award over 21,000 times from the federal government, but we’ve observed the fact that we had a compelling opportunity to appreciate the many other things our clients need and to do so in a much broader sense than just the one service we provide.”

Julie added, “The strategy assessment was really insightful. It was clear that everyone knew that strategy, but it was also clear that just knowing something doesn’t mean that there’s alignment.”

The Results

Through the Strategy Assessment, TAG had the opportunity to bring more clarity and focus to their business strategy. They aligned on focusing on stabilizing their core offering as the primary strategy by aligning leadership to goals and developing programs to build culture. To do that, they focused on:

- Making sure communications around the business strategy were accessible and understood by all employees regardless of title and level of experience
- Improving internal communications and setting clear expectations for performance and goals as they pertain to the business strategy to ensure employees were clear on their growth opportunities
- Continuing to build on and champion TAG’s core values and demonstrate alignment to the business strategy

While still new initiatives, the TAG leadership team has already seen improvements in retention and employee engagement, as well as better strategic alignment across the organization.

“What really compelled me about [PI’s Design solution] was the depth of the insights. The assessment didn’t just tell us our scores, but rather provided us with things to be mindful of when putting the insights into business practice,” Mike said. “We knew we had really good people, but that isn’t enough. We know we’ve got to have people whose priorities are aligned with that of the business. Now, we’re thinking about how to take what we’ve learned and apply it to the business going forward.”



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