



CASE STUDY: OLD MUTUAL GROUP

Adapting Disney's Quality Service Culture

Old Mutual Group, an international financial services institution, was founded in 1845 in South Africa. Its operations extend around the globe to include Europe, the United States, India, Latin America, and Australia. Currently, plans are also underway to market in China. Old Mutual's primary listing is on the London Stock Exchange as Old Mutual plc. The firm has approximately 50,000 employees worldwide.

Creating a culture of service excellence at Old Mutual began in 2001 when a new Managing Director was appointed following the retirement of the previous leader. This change in leadership presented an ideal opportunity for a culture change.

Old Mutual started the process by interviewing large numbers of employees to determine what specific changes were necessary. One of the themes that emerged from these interviews, supported by results of numerous customer satisfaction surveys, was that customer service needed significant improvement.

The management at Old Mutual listened and knew they had to take action. They appointed Jerry van Niekerk, Executive General Manager, as Service Champion responsible for driving improved service throughout the company and Hannah Thomas, Campaign Manager – Old Mutual Client Service, was designated to work closely with Jerry to coordinate the successful execution of new service strategies.

Next, they looked at benchmarking organizations widely known as world-class service icons from around the world. Several organizations were considered, and the Walt Disney Company was chosen. According to Hannah Thomas, "Disney Institute is the only place in the world where you receive the principles of service excellence combined with the hands-on experience of seeing these principles applied everywhere you look."

In 2002, the first group of Old Mutual employees took a 20-hour flight to the *Walt Disney World*® Resort to attend "The Disney Approach to Quality Service" program presented by *Disney Institute*. Hannah and Jerry were both in that first group of 20, along with eighteen other Old Mutual employees who were primarily in roles that require customer interaction.

Hannah and her classmates were absolutely delighted by their *Disney Institute* experience. Hannah comments, "Everything here has a purpose, the guest experience is amazing and it all stems from Disney's commitment to their service philosophy and standards."

After the three-day program and enjoying a few days in Central Florida, the team returned to South Africa charged with coordinating a large-scale effort to develop Old Mutual's version of two key tools to implementing a service culture. They knew it was important to not simply adopt Disney's Service Theme and non-negotiable Service Standards learned during the *Disney Institute* program, so they left with an action plan to adapt it to make it their own. Hannah remarks, "What is amazing is how easily any organization can bring back the learning from this experience and apply it, regardless of industry or geography. Customers are customers and they have fundamentally the same needs.

It was natural to adapt *Disney Institute's* principles and practices to our financial institution environment." To determine the Service Theme and Standards for Old Mutual, they ran workshops with various groups representing different parts of the business. In these workshops, they discussed how to simply articulate their organization's desired philosophy toward customers so everyone would clearly understand their purpose everyday during their interactions.

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After six months of hard work, they arrived at a solution for their Service Theme: "SMILE – Service, Make It a Life Experience!" Hannah explained, "People entrust their savings with Old Mutual, and we are committed to making each experience with us one that will encourage them to stay with us for life." The goal was to craft something that could permeate all aspects of their business. Their Service Standards were captured in the acronym REWARD, which stands for Responsiveness, Efficiency, Warmth & Courtesy, Accountability, Reliability, and Demonstrate & Show. These service standards became the common foundation of expectations for employee behaviors at all levels.

Recognizing the need for buy-in from senior management, a presentation of the proposed Service Theme and Standards was made. The proposal was approved and Old Mutual's internal training group then developed training programs to introduce the service theme and standards and to help support employees' implementation of service excellence.

To further encourage adoption of the new theme and standards, several measures for sustainability were taken. Monthly reports of client service go to the Board of Directors for their review. Also, service champions were appointed within each business unit at the executive level to drive service initiatives through their units. A monthly magazine and weekly newsletter were developed to help spread the word about service successes.

The most exciting incentive is the Managing Director's "Award for Excellence." This annual program allows employees who are typically on the front-line to be nominated by their colleagues for recognition. From these nominations, elections are held and only a very small group of people who deliver sterling service are then given the award - the opportunity to attend the next *Disney Institute* program!

To date, over 100 people from Old Mutual have attended the *Disney Institute* program. After the program, each group develops recommendations for service improvements to their various work areas. To keep the momentum going, Old Mutual has created a

Community of Practice for the Disney alumni. This group meets monthly to discuss areas of shared interest and make additional service recommendations.

Have these changes made a difference? Absolutely. According to the South African survey, "Best Company to Work For," Old Mutual has improved its employee ratings on several important dimensions including job satisfaction, diversity, and training and development. In fact, job satisfaction has emerged as the top-scoring dimension for the last five years, which implies that Old Mutual employees on the whole are feeling challenged and satisfied in their jobs. Eighty-seven percent of Old Mutual's clients surveyed in 2005 indicated they were satisfied with the service they had received and 57% of clients were delighted by the service they had received, ten points above the industry average of 47%.

Jerry van Niekerk, Executive General Manager and Service Champion, has this to say, "At Old Mutual we provide financial services to our customers who often buy a 'promise' which is delivered many years later; at the end of the term of investment or at the point of retirement. The manifestation of our commitment to deliver on these promises is found in our service. Good service is about positively surprising those around us by our attitude and commitment. Our challenge is to simplify things, to remove hassles and the so-called 'red tape.' Our focus on the big picture with Disney's Service Theme and Standards concept has helped us concentrate on the things which will have the greatest impact."

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What was *Disney Institute's* contribution to the changes at Old Mutual? Hannah Thomas sums it up by saying, "There are many companies that are excellent at service. What makes *Disney Institute* unique is the powerful combination of theory and experience. Individuals go back home asking, 'What can I do for my clients, based on what I just learned and saw firsthand?'"

For information on how *Disney Institute* can help your organization adapt concepts and strategies for service excellence, please contact (321) 939-4600 or visit www.disneyinstitute.com.