

## A Dynamic Duo

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HR Executive

HR-and-marketing partnerships are evolving, as organizations recognize their immense potential for positively impacting recruitment, engagement and branding initiatives.

When Lisa Buckingham assumed the position of chief human resources officer at Lincoln Financial Group in 2008, the financial-services industry was in free fall. Confidence had evaporated among consumers, investors and the public at large. Trust was practically nonexistent among employees and engagement was at an all-time low. Were there not a dearth of outside opportunities, many of the organization's 8,500 workers would have probably sought employment elsewhere.

Things were so bad, as spring 2008 approached, Buckingham wondered if any undergraduates would even bother to show up for Lincoln's Leadership Preparation Program, a full-time employment and training program for high-achieving recent college graduates. She feared they might be too "spooked by the industry" to take advantage of the previously popular program.

All that failed to deter Buckingham, who had just left her post as senior vice president of global talent at New York-based Thomson Reuters to join Radnor, Pa.-based Lincoln Financial. Buckingham and the rest of the management team were confident the company would persevere. But perseverance alone wasn't enough for this 20-year HR veteran. She was determined to see Lincoln not only emerge from the crisis intact, but become a destination employer for the best and brightest in financial services.

"In the midst of navigating some of the darkest days anyone in our generation had experienced, we recognized the need to have a compelling value proposition for our current employees and to explore how we could become one of those organizations people want to come work for," says Buckingham. "We wanted to make sure that, on the tail end of the market crisis, we had our employees focused on who we served and what products we offered, and that we had built a sustainable pipeline that would differentiate us in the marketplace."

But how do you go about convincing talented individuals their futures lie with a company that was obviously struggling? In early 2009, Lincoln laid off 12 percent of workers in its Lincoln Financial Distributors division. By June, the company announced it would accept as much as \$950 million in capital as part of the government's \$700 billion Troubled Asset Relief Program (TARP). In an attempt to provide much-needed capital to its U.S. businesses, it made a public offering of \$600 million of common stock and sold Lincoln National plc, its United Kingdom unit that sold life insurance and retirement-income products. While such efforts may have kept the company afloat, it didn't boost Lincoln's waning public image. In 2010, Briarcliff Manor, N.Y.-based Prism Holdings launched [www.screwedbylincolnfinancial.com](http://www.screwedbylincolnfinancial.com) to give disgruntled consumers a forum to air their grievances.

Despite the lows, though, Buckingham was confident the secret lay in building a compelling employer brand that would propel existing employees to help rebuild the company post-crisis, while attracting new talent to the fold.

Just 10 days into her new role at Lincoln, Buckingham picked up the phone and called Will Ruch, president, CEO and managing partner of Versant, a Milwaukee-based marketing-communications firm specializing in employer branding, generational alignment, organizational alignment during mergers and acquisitions, and culture change. She had worked with Ruch on various internal-branding and career-site initiatives during her tenure at Thomson Reuters. Her request was simple: Would Ruch come to Lincoln to meet with her and the company's chief marketing officer to discuss how they could work together to create a new employer brand?

Buckingham's interest in soliciting help from the marketing discipline certainly isn't novel. Any HR executive worth his or her salt has reached across the organizational aisle or enlisted the services of an external marketing agency on one or more initiatives, typically related to driving greater participation in

saving for retirement, wellness initiatives or annual enrollment in the company's health-benefits program. In fact, Ruch has stockpiled so many examples of HR/marketing partnerships, he was able to fill an entire, recently published book, *HR and Marketing Power Partners: The Competitive Advantage That Will Transform Your Business*, co-authored with Pat Nazemetz, former chief human resource officer for Xerox Corp who is now a principal at NAZ DEC LLC, a Sleepy Hollow, N.Y.-based consulting firm specializing in transition strategies for executives.

While Ruch, Nazemetz and other proponents of HR/marketing partnerships agree the basic concept of collaboration between the two functions is nothing new, they argue that the drivers behind such arrangements -- and their potential to drive fundamental change -- couldn't be more relevant in today's wildly interconnected, social media-obsessed world. "Companies are struggling to figure out how they can get their employer brand into all channels where they are touching all different kinds of people," says Ruch. "That requires HR to apply a marketing mind-set to their work."

While it's tempting to view these relationships as marketing coming to HR's assistance, such partnerships are no longer merely a case of HR enlisting marketing's help. These days, it's widely recognized that HR has just as much to teach marketing as marketing has to teach HR. Just as a marketing discipline can help in the crafting of messages that will aid in the attraction and retention of talent, HR can help create a legion of brand ambassadors that will take the message of the brand out to the world and into the path of potential customers. In some instances, the HR/marketing partnership has evolved into such mutually beneficial arrangements, companies have been led to rethink their organizational charts altogether.

### **A Consistent Voice**

Immediately upon embarking on its HR/marketing partnership, Lincoln Financial set out to learn what employees considered important and what motivated them to stay with the firm. Working with members of the Versant team, professionals from both functions surveyed Lincoln employees, conducted focus groups and gathered input from key leaders across the business. The goal was to develop a value proposition that would engage and align employees to the goals of the business, while ensuring that the workplace experience feeds the customer experience.

Versant distilled the resulting data into three elements that became the nucleus of Lincoln's employer-brand promise: "Meaningful Work. Dedicated People. Confident Future." To build excitement and support surrounding the launch of the new brand, Versant produced a video that was played at a series of town-hall meetings across Lincoln's offices. That promise subsequently became a key component of all employee communications and recruitment-marketing initiatives.

"People were looking for something optimistic to hang onto during the market crisis," says Buckingham. "Through the entire life cycle of the employee experience, they can hang their hat on that tagline."

In the midst of the internal-branding initiative, Lincoln's chief marketing officer suddenly left the company, further handicapping an already crippled organization. That propelled senior management to approach Buckingham with a unique proposition: Would she be willing to assume certain marketing responsibilities in addition to her CHRO duties by having marketing report into the HR organization? Initially, Buckingham was somewhat hesitant. While she firmly believed the two roles shared many common skill sets -- a solid grounding in psychology, for one -- she was unsure how she would divide her time between two such critical functions. However, she quickly began to envision the strategic possibilities of assuming a hybrid HR/marketing position.

"There are a lot of similarities to running the organizations efficiently and effectively," says Buckingham. "You end up wearing two hats, but at the same time, it makes it so easy to have a consistent voice, internally and externally."

In November 2010, she agreed to assume responsibility for overseeing Lincoln's brand and enterprise communications and corporate-social-responsibility activities, while retaining her position as executive vice president and CHRO. One of Buckingham's first official acts was to hire a new corporate chief

marketing officer. She selected Jamie DePeau, former senior vice president of marketing at New York-based TIAA-CREF, to provide strategic leadership for Lincoln's marketing, brand and corporate communications. DePeau reports directly to Buckingham and sits on her leadership team.

"Jamie and I have a deep partnership and we learn from each other every single day," says Buckingham. "We have forced each other to raise the bar. We've decided there are no limits, so let's see what we can do and how we can differentiate ourselves."

### **Healthy Competition**

A close collaboration between the two functions makes perfect sense, according to Scot Marcotte, managing director of talent and HR solutions for New York-based Buck Consultants. He goes so far as to brand the relationship "symbiotic," citing the mutual benefits each role shares with the other.

"There is a natural linkage between HR and marketing," says Marcotte. "Taking advantage of that give and take helps ensure that HR has the right access to great marketing concepts and techniques to drive engagement within the employees, just as marketing can take advantage of the talent within the organization to help sell its products and services."

That's not to suggest it's all smooth-sailing. In some organizations, HR and marketing have not always been the best of friends, as can be evidenced in numerous newspaper and magazine articles about the relationship between the two functions. Headlines such as "HR v. Marketing" (*HR magazine*, United Kingdom, May 2011), "Unlikely Partnership: When HR and Marketing Join Forces" (*Harvard Business Review*, September 2012) and "Strange Bedfellows: Could HR Be Marketing's New Best Friend?" (*Marketing Management*, January-February 2005) serve to stoke the fire, arguing that marketing has traditionally been viewed as the "sexier" of the two functions and the one with more potential to directly impact the bottom line, while HR has been viewed largely as support staff. While he admits there is the potential for friction when you bring together two powerful functions, Ed Boswell, principal and U.S. people and change leader at New York-based PricewaterhouseCoopers, says the companies he's advised haven't let these "intrinsic frictions" get in the way.

"There's always a little bit of friction between any two functions within a large organization," says Boswell. "Marketing is pursuing its goals, HR is pursuing its goals, and there's always this feeling of, 'You guys aren't doing enough for me and here I am carrying the heavy water for the company.' It's just organizational life as we know it."

**Rather than friction, it's usually a sense of competition that develops within an HR/marketing partnership, according to Greg Besio, executive vice president and chief human resources officer for Aon in London. It's generally a healthy competition, however, and one that leads to greater results in the end.**

**"I wouldn't say there is friction, but we do push each other pretty hard to go as fast as humanly possible," says Besio. "We find ourselves walking a fine line between trying to drive change versus trying to gauge the organization's capacity to absorb change."**

**Besio and his marketing counterpart, Phil Clement, global chief marketing and communications officer, collaborate almost daily. Their offices are located literally next door to one another and they have worked together on everything from branding and talent strategies to the cultural integration of Aon and Hewitt Associates in 2010. Because the organization boasts such a massive global presence, across 120 countries, Besio and Clement have embraced social media as a means of instilling a sense that "we're all in this together" amongst its widely dispersed workforce.**

**One of the duo's favorite social media initiatives, "Pass It On," took aim at boosting global employee engagement through a partnership with Manchester United, an English professional football (soccer) club for which Aon serves as "principal partner and global shirt sponsor." Three**

**Aon regional route teams -- Asia-Pacific; the Americas; and Europe, Middle East and Asia -- competed for points by passing United soccer balls along three transcontinental routes covering over 100,000 miles. The balls traveled to 63 countries, stopping at 195 Aon offices and other global points of interest. As the balls passed through each office, Aon colleagues celebrated the firm's commitment to the communities in which it serves by organizing local charitable activities and client events. In some instances, the balls themselves played a key role. For example, Aon colleagues in Cape Town, South Africa, coordinated a skills-and-drills soccer program for disadvantaged children with the official Manchester United Soccer School.**

**Aon management viewed the initiative as a means of building teamwork and camaraderie throughout the company, while encouraging employees to get more involved with new communities of clients. As the balls passed through their area, colleagues in each Aon office earned points for their team by submitting photos, videos and stories covering various aspects of Aon, including client success stories, colleague profiles and stories on local community service initiatives. At the end of the eight-month initiative in June 2012, the balls converged in London, where they were auctioned off for charity at Aon's 25th Anniversary Gala Celebration.**

**"For our colleagues who are social-media active, that was particularly compelling," says Clement. "We could send out all the emails we wanted saying we are a firm that celebrates these values, but until people see it, they don't believe it. There's nothing more convincing that you have a global company that is living the same values than actually seeing people doing these things in various locations around the world. That's why social media has been very important."**

The pervasive nature of social media makes it the ideal medium for recruiting, development and ongoing engagement initiatives. In many organizations, however, it has been viewed as marketing's domain. All too often, HR has shied away from social media -- in part because HR leaders didn't want to be perceived as encroaching on marketing's turf, but also out of concern over what kinds of potentially damaging information or opinions employees might choose to share.

Without the ability to control what kinds of comments go out over social media, disgruntled employees can very easily damage a company's reputation and hamper its ability to recruit new workers.

Those concerns were top of mind at Alpharetta, Ga.-based LexisNexis Risk Solutions. After consulting with the workforce, Senior Vice President of Human Resources Don Welsko and Chief Marketing Officer Lisa Agona proposed Risk Intranet, a Facebook-style site intended to facilitate collaboration across the organization.

The company's 4,000 employees would be encouraged to start blogs, submit articles, share comments or chat with the CEO, other senior executives or their peers. Initially, the company's largely baby boomer-leadership team balked at the idea of allowing employees the unfettered ability to dialogue about whatever they want, but workers soon demonstrated their maturity and professionalism by "policing" the site themselves when a couple of "borderline inappropriate" blogs showed up on the site shortly after its launch.

Marcotte says this is a good illustration of one area where marketing can play a key role in monitoring activity and helping to mitigate any negative trends that happen to emerge.

"Marketing is good at identifying where negative perceptions are playing out on the consumer side and making sure that products are not negatively impacted by external perceptions," says Marcotte. "On the HR side, they can see in the same way if bad trending is occurring on LinkedIn or some of the other employee sounding boards. The organization can then choose how they are going to react to that."

Marketing's toolbox is full of all kinds of skills and strategies that can easily be transferred over to the HR realm, according to Tom Maddison, chief human resources officer at Xerox Corp., based in Norwalk, Conn. One of the most significant is segmentation, the ability to divide a broad market into subsets of consumers -- or employees, as the case may be. Segmentation comes in handy because all employees

don't "consume the value proposition in the same way," he says. Rather, they pick those parts that align to them -- learning and opportunity for some; work/life balance for others -- and disregard the rest. Marketing can help HR reach these specific segments by crafting different messages for different subsets of employees.

### **Standing United**

In some instances, the goal may not be to segment employees by age or function, but to unite them under one common purpose. That has been the goal of numerous organizations, including LexisNexis Risk Solutions, which launched an ambitious engagement program dubbed "I Am LexisNexis." A joint initiative between HR and marketing, "I Am LexisNexis" was intended to unite the multigenerational workforce behind the common goal of helping their customers predict, assess and manage risk.

"You can't see anything we do in HR without the 'I Am LexisNexis' brand on it," says Welsko. "From our recruiting materials and orientation process to performance reviews and reward programs, we reinforce, every single step of the way, what it means to be part of LexisNexis Risk Solutions."

Lincoln Financial also sought to unite employees around its external "Chief Life Officer" campaign, which encouraged consumers to take charge of their own lives and work to make all their dreams -- financial and otherwise -- come true. Buckingham and DePeau set out to identify employees who had embraced the concept of Chief Life Officer and had assumed control of their own destinies. In each of the company's key cities -- those visited by the CEO's annual town hall roadshow -- they videotaped employees talking about how they were living the brand by taking charge of their own lives.

One employee, who identified herself as a "Chief 'You Can't Stop the Beat' Officer," recalled losing weight to pursue a part-time acting career. Another, calling herself a "Chief Go Getter Officer" told of enrolling in college and earning numerous advanced degrees once her children were grown. Yet another spoke of leveraging Lincoln's adoption benefit to fill an empty place at the dining room table, which was how he described his vision. He called himself a "Chief More Love to Give Officer."

The resulting video was powerful and effective: "It really ties together the Lincoln culture and highlights those people who are living our brand," says Buckingham. "They are truly the best representatives and ambassadors of our brand."

As far as Buckingham and DePeau are concerned, such accomplishments are just the beginning. Looking forward, the duo intends to build on its partnership by launching a new careers site, promoting its employment brand on-campus, expanding its social-media presence and looking at new avenues for sourcing talent.

"This is all about transformation; it's about the evolution of organizations working together," says Buckingham. "HR and marketing are building bridges that no one ever imagined and they have the potential to be very powerful."