

# Reverse mentoring at the Hartford: Cross-generational transfer of knowledge about social media

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# REVERSE MENTORING AT THE HARTFORD:

*Cross-Generational Transfer of Knowledge  
About Social Media*

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BOSTON COLLEGE  
Center for Work & Family  
CARROLL SCHOOL OF MANAGEMENT

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## ACKNOWLEDGEMENTS

Each year, The Sloan Center on Aging & Work collaborates with our employer partners to select one strategic area of focus for a case study, conduct in-depth interviews, and publish a report on an innovative practice.

In 2012, we decided to focus on the topic of Mentoring and the important role it plays in employee career development. We were fortunate to learn of The Hartford's Reverse Mentoring Initiative which provides an outstanding example of what a successful mentoring program can accomplish.

We would like to express our appreciation to The Hartford for sharing the information in this report. In particular, we are grateful for the conversations with The Hartford's Diversity & Inclusion team. In addition, we thank Jennifer Sabatini Fraone from The Boston College Center for Work & Family for her contributions and support of this report.

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## ABOUT THIS INNOVATIVE PRACTICE BRIEF

Traditionally, workplace mentors are senior managers who are older than the employees they mentor. Jack Welch, former chief executive of the General Electric Company, turned that idea on its head. He championed a professional development strategy called reverse mentoring: a formal program in which a young, junior employee with something to teach is partnered with an older, senior manager with something to learn. Welch began the practice at GE in 1999, pairing employees in their 20s and 30s who were knowledgeable about the Internet and interested in new technology with executives—including Welch—who were novices in that realm. Recently, other organizations have become interested in the potential payoffs of such collaboration.

The Hartford is one such company. There, Liam E. McGee, The Hartford's Chairman, President and Chief Executive Officer, says he observed a need for the company "to become more fluent in social media, mobile computing, the cloud, and other digital technologies our customers and partners are using." Having heard about reverse mentoring at GE, he thought that might be the way to bring his company up to speed.

This brief explains why and how The Hartford introduced reverse mentoring and what happened as a result, so that other companies interested in the strategy can learn from The Hartford's experience.

### MENTORING: AN OVERVIEW

1. Informal and formal mentoring are time-honored strategies for occupational and career development.
2. Mentoring is a variant of apprenticeships. It offers opportunities for one person to learn skills and expand professional networks as a result of a relationship with a colleague who has more knowledge and experience.
3. There is substantial evidence that mentors often benefit from these relationships, too.
4. Traditional mentoring is predicated on the assumption that older employees who are advanced in their careers can educate younger employees and move them up the corporate ladder.
5. Reverse mentoring turns the paradigm of traditional mentoring around. Junior employees share skills and knowledge that senior staff need in order to do their jobs well and stay engaged.
6. In both traditional and reverse mentoring, close relationships are formed that create a pathway for bi-directional learning by both the mentor and mentee.

*The Hartford (thehartford.com) is a leader in property and casualty insurance, group benefits and mutual funds. Founded in 1810, the company has its headquarters in Hartford, Connecticut. This brief draws from interviews that researchers at Boston College's Sloan Center on Aging & Work conducted with company employees, supplemented by data that the company provided.*

## WHY THE HARTFORD EMBARKED ON REVERSE MENTORING

Several years ago, two cadres of employees at The Hartford came together unexpectedly. Although separated in the corporate hierarchy by age and rank, a group of junior employees and a group of top executives happened to discover that they shared an interest in social media as a tool to modernize the company's brand, strengthen the company's financial position, and enliven the company's external and internal communications.

The story of reverse mentoring at The Hartford begins with the way these two groups found themselves on common ground.

### *Impetus from The Hartford's management*

Several concerns pushed The Hartford's corporate leaders to start thinking about social media.

First, these executives realized that the habits of people looking for insurance were changing. The executives learned that 34 percent of the world's 200 million bloggers post opinions about products and brands, and that 25 percent of the search results for the world's top 20 largest brands are links to user-generated content. The implications were clear. To reach new customers, The Hartford would have to get ahead of conversations already well under way across the Internet about insurance and financial products. Before the executives could build the company's use of social media, they knew that they themselves would have to understand the tools they wanted to advocate. They also knew they had some distance to travel on that learning curve.

Second, understanding new workplace needs of The Hartford's workforce had become a priority. The Hartford's leaders were well aware of the potential impact on the company of changing demographics. In the nation as a whole, they foresaw the displacement in the workforce of 76 million retiring Baby Boomers (born between 1946 and 1964) by 92 million Millennials (roughly the generation born between the early 1980s and the early 2000s). At The Hartford as of 2010, Millennials represented 14 percent of employees. Management projected their number would grow to 25 percent by 2015. Simultaneous with this growth, however, was an alarming, industry-wide rate of voluntary attrition for this age group: 15 percent. All of these shifts prompted The Hartford's leaders to consider innovations in response to the special needs and interests of Millennials: above all, workplace flexibility and, with that, the accommodation of dual careers in families. Accomplishing this would require increased access by employees to electronic communication technologies—tools that Millennials were already using actively in their personal lives.

*"Explaining the technology is one thing, but actually going through it and working with it together with your mentee is much more effective. Many people are scared of new technologies without a guide, much like climbing Mount Everest without a sherpa."*

— A mentor, pilot program

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## Shifting demographics of The Hartford's workforce

		Percentage of company workforce as of:		
Generation	Year of birth	2005	2010	2015
Millennials	1982-2000	4	14	25
Gen Xers	1966-1981	43	44	44
Baby Boomers	1946-1965	50	41	31
Traditionalists	1926-1945	3	1	0

Source: Chart created using workforce projections provided by The Hartford in 2012 relevant to shifts in the future Hartford population.

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The third concern went to The Hartford's bottom line. Year-end financial results in 2009 showed a declining stock price and a decline in real estate values. This gave The Hartford's leaders another incentive to rethink the company's ways of doing business.

### *Impetus from The Hartford's junior employees*

By the time The Hartford's executive leaders embarked on these conversations, 16 junior employees had already organized an informal information technology round table.

This small group of Millennials met in the company cafeteria on their own time several evenings each week, aggressively exchanging ideas about technological innovations they thought would help them in their work. The meetings started because these employees were all passionately interested in social media. They were excited about the pace at which the capabilities of the platforms were advancing and frustrated that The Hartford was not keeping up.

Eventually, they decided to broach the subject with The Hartford's leadership.

### *Convergence of interests*

When the junior employees started talking to senior managers, they discovered that they were presenting answers to questions that their bosses had been asking:

- Where can the company turn for guidance on social media?
- How can the company's traditional, hierarchical structure adjust to the new technology?

Once the two groups came together, an obvious strategy emerged: the young, technologically savvy staff would share their knowledge of social media with The Hartford's senior staff. Executive leadership had little difficulty adjusting to this role-reversing strategy. They realized the importance of a multigenerational workforce. They understood that for The Hartford to sustain its rank in the industry as an "employer of choice," it would have to respond to the needs of the changing workforce population. For Liam E. McGee, Chairman, President and Chief Executive Officer, the combination of company attrition, industry turnover, and competition to become a sought-after employer pointed to a strategy that had been successful at General Electric and other companies: reverse mentoring.

The young group, for their part, were excited about the executives' positive response to their suggestions and eager to move their explorations of social media from the underground to the head office. In reverse mentoring, they saw a welcome opportunity to get to know and work closely with the company's leaders.

The time to leap had come.

## **HOW THE COMPANY IMPLEMENTED THE INNOVATION**

To support its reverse mentoring program, The Hartford used its standard change management model, ADKAR. This model developed by Jeff Hiatt, the chief executive officer of Prosci (a change management research company), has five elements: awareness of the need for change, desire to support and participate in the change, knowledge of how to change, ability to implement the change, and reinforcement to sustain the change.

The Hartford recast this framework for change as follows:

- awareness of the need to change The Hartford's practices in information technology
- desire by The Hartford to participate in this change and support it
- thirst for knowledge of emerging trends and technologies, in order to use this information to The Hartford's advantage
- ability to implement these changes at The Hartford over time
- reinforcement of the change and commitment to sustain it by The Hartford's executive leadership team

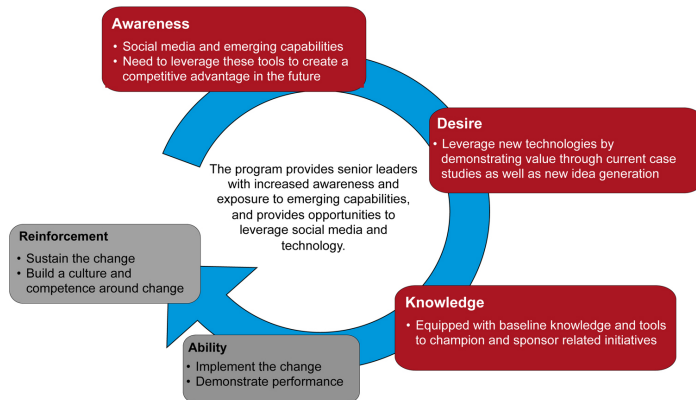
These targets oriented the staff as they embarked on the reverse mentoring project, serving as rules of the road for mentors and mentees and establishing the company's commitment to the project's business goals.



## Developing a Cultural Change to Contemporary Technologies and Practices among Senior Leaders



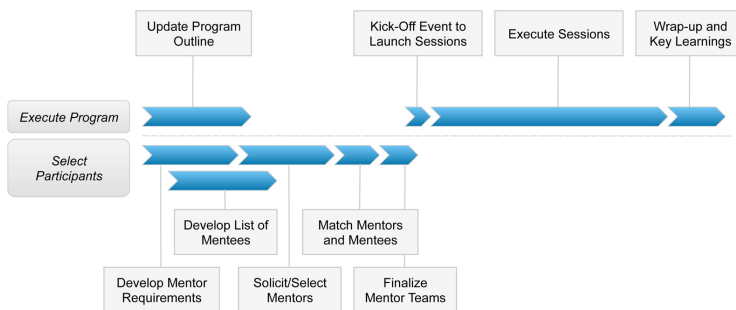
The Reverse Mentor program is aligned with Prosci's ADKAR Model for change.



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*“Reverse Mentor Cycle Process” slides: The PowerPoint slides reproduced here, with The Hartford’s permission, were part of a presentation to the company’s staff to introduce the reverse mentoring project’s process and goals.*

## Reverse Mentor Cycle Process



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Designing the reverse mentoring project was itself a unique opportunity for The Hartford’s tech-savvy junior employees and the senior leadership.

To begin, a core team of junior and senior staff worked out the program’s goals:

- Develop a broad and deep understanding of the latest tools and trends impacting social media interactions.
- Experience the changing consumer marketplace and maximize communication in a variety of social media platforms—with an emphasis on listening to what consumers are saying.

- Generate a system for the mentor/mentee pairs to communicate efficiently and effectively.
- See the market through the “eyes of Millennials,” getting to know that generation’s distinctive perspectives on consumer behavior and business growth opportunities.
- Drive cultural change within the company to adopt and keep pace with modern technologies and practices.

The mentees were Mr. McGee and key leaders from such business units as digital commerce, consumer markets, technology, law, operations and claims.

To recruit mentors, the core team sought people across the enterprise who had strong technical and communication skills and who were early in their careers, top performers in their positions, and at ease with social media. Applicants were required to submit a resume (The Hartford calls it a “talent profile”, an example appears on page 11), to complete a short questionnaire on their skills and experience, and to solicit recommendations from their teammates and manager.

*How The Hartford spread the word about reverse mentoring opportunities*

<i>weConnect</i>	The Hartford’s internal social media network; lists business areas and group categories for Hartford employees to search
<i>Career Connect</i>	A category on the weConnect site; provides links to employment opportunities and career management information
<i>Reverse Mentoring</i>	New category on weConnect created for all Hartford employees to view; program participants used the site to access session schedules, forms, assignments, and data on the project’s progress

Source: Chart created using information provided by The Hartford.

In reviewing references, the core team wanted to know, among other things, if candidates were trustworthy and had a reputation for keeping information confidential—traits that would be reassuring to the mentees. As the core team culled the applications, they paid close attention to candidates’ backgrounds, hobbies, and personal interests, looking for any that intersected with those of the mentees. The hope was that common interests would keep the mentor/mentee pairs engaged in personal conversation throughout the program—thus building morale and collegial relationships that would last beyond the life of the project.

A prerequisite for mentors was assurance that they could give the project several hours a month during their regular work schedules. For each monthly session, mentors were expected to need an hour for research and for meetings with other mentors, an hour to prepare the session, an hour to conduct the session, and an hour for notes and other follow-up.

Finally, to avoid conflicts of interest, mentors had to be multiple levels below their assigned mentees in the corporate hierarchy and in a different line of business or function.

In the end, the core team chose a group of mentors with focus on diversity of geographic location, backgrounds, and gender. A coach from the company's human resources department was designated to support each pair.

Next the core team set up a master schedule. They decided not to deploy all of the pairs at once, but instead in two waves with a period for review and evaluation in between. The pairs met for a half-hour or an hour every three to four weeks, generally in the offices of the mentees. Each session had a formal agenda, which the mentors set in response to their mentees' knowledge, needs, and interests—information that the mentors were tasked to research before the project started.

Between sessions, the mentees completed reading assignments and the mentors met with their coaches to discuss session topics, approaches, and activities.

All of the mentees had some familiarity with social media and emerging technology. What the mentors offered them was the chance to explore applications of the technology to their own lines of business within The Hartford, and also the chance to get to know representatives of a new generation of customers.

The Millennials gained the chance to make a difference at The Hartford beyond the scope of the jobs they had been hired to do, and also the chance to have direct, working relationships with people in the company's top echelons. Along the way, they acquired some fundamental training in professional comportment. Guidelines for the project (excerpted on page 12-13) reminded mentors to dress appropriately, arrive for appointments 10 minutes early, be ready to offer a two-minute "elevator pitch" about their own career aspirations, study the mentee's experience and accomplishments, and—basically—not to do all the talking.

### *Tools for the company's reverse mentoring project*

While the selection and matching process evolved, the core reverse mentoring team gathered or designed resources to help keep the experiment on track. The following proved to be most valuable.

1. **Talent Profile:** The talent profile template is used at The Hartford for internal talent management purposes, especially to highlight top talent. It is easier to absorb than a traditional resume, so the reverse mentoring team adopted it as a way for mentors to introduce themselves to mentees. They also used the profiles to pair mentees and mentors in consideration of their lines of business, current and past work experience, hobbies, and personal backgrounds. Each mentor filled out a talent profile, complete with a photograph.

The core reverse mentoring team collected and used the profiles to pair mentees and mentors in consideration of their lines of business, current and past work experience, hobbies, and personal backgrounds.

## TALENT PROFILE FORM

Current role (3 to 5 statements)

Job title

Length of time at The Hartford

Development goals (summarize 3 to 4)

Competencies (list 3 to 4)

Past experience (titles and accomplishments)

Education (schools, years of attendance, and areas of distinction)

Background (birthplace, hobbies, and personal interests)

2. Session schedule: A master schedule for the sessions and interim meetings held the participants accountable for the reverse mentoring project's orderly conduct and completion. The sessions were posted to everyone's calendar in advance.
3. SharePoint site for the project: This efficient tool allowed participants to communicate between sessions and coaching meetings without having to schedule an appointment or find a conference room. A leaderboard on the site provided project statistics, sortable by mentee/mentor pair, by department, and by session. Keeping track of whose sessions were up to date, whose were behind, who was posting their session notes, and who was not developed into a friendly competition among the teams as the project continued. The SharePoint site also allowed the core team to monitor each pair throughout the project, and use what they learned to inform their plans for the project's second wave.
4. Guidelines: This document served as a companion for the mentors, establishing their responsibilities for the project, tips on content, and advice on professional behavior.

## MENTOR GUIDELINES FOR REVERSE MENTOR PROGRAM (excerpt)

### Session #1

#### Preparatory activities

Research the mentee's background using Google, Hartford internal resources, LinkedIn, etc.

Research the mentee's line of business

Review program curriculum

Dress professionally

Think through career aspirations and development goals and prepare a two- minute elevator pitch

Bring the following materials:

- laptop
- relevant mobile devices
- talent profile and full-length resume
- program curriculum
- any other reference materials

Arrive 10 minutes early

#### During the session

Introduction (establish rapport)

- Family life, hobbies, professional and personal interests
- Be sure that you and the mentee share information equally, with a focus on learning about each other

Ask generic questions to determine the mentee's familiarity with the Internet

- Do you have a Facebook account? A LinkedIn account?
- Do you pay bills online? Shop online? Get statements online?
- Do you watch YouTube? What's your favorite?
- Do you read blogs? Any RSS feeds? (etc.)

Review curriculum with the mentee

Determine the mentee's familiarity with and level of interest in the following:

- Technology and devices
- Networking, connections, and communication
- Finding Information (search engines)
- Sharing and collaboration
- Multimedia

(After this session, mentors will complete a survey tool noting the mentee's responses. At the end of the project, pre- and post- program data will be collected and compared.)

Discuss the mentee's business priorities for the year in terms of this question:
<ul style="list-style-type: none"> <li>Where are the technology and social media opportunities to aid employees and connect with customers?</li> </ul>
After the session
Write session notes within three days, and post them on project discussion board
Send a follow-up email message to your mentee <ul style="list-style-type: none"> <li>Mention a topic of interest to your mentee</li> <li>Give links to readings for the next session</li> <li>Detail any outstanding items/questions deferred to the next session</li> <li>Suggest topics for future sessions</li> </ul>

Source: Chart created using information provided by The Hartford.

## HOW REVERSE MENTORING CHANGED THE COMPANY

Once launched, the project began to resonate with The Hartford's employees of all ages. Mentors were eager to share their expertise in social media and technologies with the organization's leaders (the mentees), who were excited and motivated to learn.

Some impressive metrics suggest the project's impact on the company. Here are some examples:

More than 50 mentees in seven states participated; 70 percent completed at least five of the seven sessions. Of 12 mentees who participated in the first wave, 80 percent rated the project "extremely effective/effective" for Business and 97 percent rated it "extremely effective/effective" for Personal.

Many mentees said they realized part way through the project's first wave that their mentors were some of the company's best and brightest adopters of new communication technology. They saw that retaining these employees going forward would be a critical factor in sustaining The Hartford's talent pipeline. Of the 12 mentors in the project's first wave, 11 were promoted within a year of the program's inception.

"While these promotions were not a direct result of participation in the reverse mentoring program, these top-talented junior employees benefited from a significant amount of exposure, sponsorship and stretch development" said Lori Rodden, head of Talent Management at The Hartford.

As a result of multigenerational collaboration that evolved from conversations during the reverse mentoring project, two patents were written and filed. Work on both is confidential and continues. Anecdotal evidence of the project's impact is also strong.

One of the Millennials shared that participating in this program gave him insight and a feeling of "connectedness" with The Hartford that perhaps some of his colleagues, who had not been part of the reverse mentoring project, might never experience.

Following a mentoring session late in the project, an executive mentee walked his mentor down the hall to introduce him to senior-level colleagues. The mentee

said, “This is my reverse mentor, and I want you to talk with him about your career. He’s doing amazing things for me right now in mine.” As a result of the mentee’s support and introductions, within two weeks the Millennial mentor had scheduled appointments with senior leaders who were not yet in the program. At the end of the first wave, the mentor was promoted.

Throughout the project, mentors and mentees reported having “aha” moments and eye-opening ideas that led them to embark on new activities or conduct business in new ways. In a recent marketing campaign, for example, management planned to contact prospective customers by telephone. One of the mentors informed a senior executive that most Millennials use mobile phones, not landlines—thus saving the company time and money and making the campaign more likely to succeed with its target clientele.

Internal changes that The Hartford made in the aftermath of the reverse mentoring pilot were valuable, as well.

One welcome decision for the company’s tech-savvy employees was not only to allow but also to support the use of social media by employees to do their work. This decision required an update of the organization’s Electronic Usage policy, and was explicitly linked to the reverse mentoring project.

Another outcome was The Hartford workforce’s rising comfort with the company’s internal electronic communications network. Instead of scheduling meetings first to present information and then to follow up, the staff became accustomed to putting information “out there on the network” where others could consider it and comment on it. As a result, meetings that did need to be held were more productive. If The Hartford had not conducted the reverse mentoring project, one might ask how long it would have taken employees—senior managers in particular—to pick up these new communication habits.

The senior leadership and junior staff adopted reverse mentoring for one purpose: as a strategy that would position The Hartford to use social media and emerging technology to drive innovation. Once the project got the two groups talking, though, creative ideas began to surface about new topics that reverse mentoring pairs might profitably explore: diversity, green corporate practices, and sustainability, for example. At the time this article was going to print, the core team is deciding how to incorporate some of these topics in order to launch Wave III of the program.

The field is clear for these initiatives and others, because reverse mentoring at The Hartford is now a national program.

## REASONS FOR REVERSE MENTORING'S SUCCESS AT THE HARTFORD

*Participants in The Hartford's reverse mentoring project agreed that the influences described in this table made a difference in the pilot and to the organization that had not been anticipated. Although these elements were built into the project's design, their value emerged only when the project was under way or even after the first wave ended.*

Influences	Descriptions
Executive support	<ul style="list-style-type: none"> <li>• The Chairman is one of the mentees</li> <li>• Leadership admits they have something to learn</li> <li>• Leadership believes in and supports the core concept</li> </ul>
Commitment	<ul style="list-style-type: none"> <li>• Practice what is preached</li> <li>• Walk-the-talk</li> <li>• Apply the new skills and use them today</li> </ul>
Posting on SharePoint	<ul style="list-style-type: none"> <li>• No hallway meetings</li> <li>• No hallway decisions</li> <li>• Hallways don't exist on SharePoint</li> </ul>
Living with a leaderboard	<ul style="list-style-type: none"> <li>• What team is currently ahead</li> <li>• What team is currently behind</li> <li>• Assess the competition, right now</li> </ul>
Remaining flexible	<ul style="list-style-type: none"> <li>• Stay open to change</li> <li>• Listen to feedback</li> <li>• Use changes and feedback to improve</li> </ul>

Source: Chart created using information provided by The Hartford.

## WHAT THE HARTFORD LEARNED ABOUT REVERSE MENTORING THAT CAN BENEFIT OTHER COMPANIES

*"Working across generations helps realize the tremendous value of diverse perspectives which often spur creativity and innovation. The long-term success of any organization depends on the contributions of employees from all ages and experiences. The reverse mentoring program on social media and emerging technologies is a shining example of innovation."*

— A mentor, pilot program

Reverse mentoring is an adaptable strategy that can be modified for rollout and implementation by other organizations. The Hartford offers the following pointers for the design of reverse mentoring schemes elsewhere:

- Create a project timeline.
- Outline the business objectives (i.e., strategize how to link reverse mentoring as directly as possible to what the company is trying to accomplish).
- Assure that each mentor is thoroughly informed about what the mentee wants to achieve in each session and by the end of the series.
- Give the program a formal structure with clear agendas and timelines.



- Guide executive mentees to let their guard down with their mentors and be open to new knowledge. Guide mentors to understand that each mentee is going to learn differently and to treat learning differences with respect.
- Use the mentor role to keep talented junior employees energized and focused.

Another important consideration is to align the design of a reverse mentoring project with a company's culture. For example, for traditional organizations, consider a project with formal content and clear protocols for the mentor/mentee pairings. For less traditional organizations, create an informal plan with flexible topics and schedules and less structure governing the interactions of mentors and mentees.

Throughout the pilot program at The Hartford, the mentor/mentee pairs shared feedback with core team members. Some of their comments validated the following aspects of the project's design. First, at least three times during the first wave of the project, mentors met with their coaches from the human resources department. Second, before each session, mentors met briefly with mentees to review and update what was expected during that session. Third, each mentee used the SharePoint site to keep track of assignments and read the mentor's notes from the previous session. Immediate access to this information made it much easier for each mentee to prepare for the sessions. Fourth, making each pair's interchanges on SharePoint available to all other pairs allowed a healthy competition among the mentor/mentee pairings to develop. Last, when The Hartford moved to the second wave of the project, new participants were coached by participants from the first wave, enriching the experience.

One testament to the project's success at The Hartford is a push from mentors and mentees to create an alumni group so they can nurture and maintain their relationships and knowledge—a development that was extremely encouraging to the core team.

Reverse mentoring provides corporate leaders with a valuable generational perspective on topics not typically engaged at that level in an organizational hierarchy. The opportunities for learning and open discussion that reverse mentoring provides are fluid and countless. The new relationships formed by mentors and mentees can be inspiring and genuine.

Perhaps the most important gift of reverse mentoring, regardless of the specific business issues the strategy can be used to address, is the affirmation in all sectors of a company and across generations that the next big idea can come from anywhere.

## ABOUT THE SLOAN CENTER ON AGING & WORK

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Established in 2005, the Sloan Center on Aging & Work at Boston College promotes quality of employment as an imperative for the 21<sup>st</sup> century multi-generational workforce. We integrate evidence from research with insights from workplace experiences to inform innovative organizational decision-making. Collaborating with business leaders and scholars in a multi-disciplinary dialogue, the center develops the next generation of knowledge and talent management.

Since our founding, we have conducted more than 20 studies in collaboration with employers: for example, studies on “Age & Generations,” “Talent Management,” and “Generations of Talent.” Studies under way are “Assessing the Impact of Time and Place Management” and “Engaged as We Age.” The Sloan Center on Aging & Work is grateful for the continued support of the Alfred P. Sloan Foundation.

For more information about the Sloan Center on Aging & Work at Boston College, please visit: <http://agingandwork.bc.edu>.

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