

U.S. Apprenticeship Program: Insurance Certificate / AASBA / OTJ

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Zurich, in partnership with William Rainey Harper College and the US Department of Labor, launched a first of its kind program in the U.S. insurance industry Apprenticeship Program.

- The Apprenticeship Program was part of the Obama Administration’s “Upskilling Initiative” where the focus is empowering the workforce through education, training and on-the-job experience.
- The Apprenticeship Program will contribute to Zurich’s goal to be the best global insurer, while supporting the communities in which we work and live.
- Zurich is committed to having 100 apprentices complete the program by 2020.

Zurich Insurance “Apprentices” work full time as Zurich employees while attending Harper College pursuing an Associate in Applied Science degree in Business funded by Zurich. The strategic outcome is to create a repeatable model that can be shared with other insurance industry companies to ultimately make a positive impact on the US labor force.

Sourcing for Success



Outline Apprenticeship Sourcing Strategy

- Purpose and general assumptions guiding the work effort
- Establish a strong Community College partnership

Dovetail Corporate & Academic

- How job seekers access and apply to Harper / Zurich
- Structure of assessment & selection process – current and future

Ensure we meet our 5 year goal of 100 apprenticeship employees hired and on-boarded through planning, prioritizing and managing our investment

- Successive hiring panel approach
- Consistent on-boarding that works hand in hand with the local community college as it takes a village to ramp up the sourcing effort that crescendos from the time of offer accepted through to the first day of school/OJT

5 Year Sourcing Strategy

Zurich/Harper Linkage and Flow

5 Year Hiring Strategy

On-boarding Strategy

Program Deliverables – Investment Overview



Components to the Program	Description
Administrative Guide	<input type="checkbox"/> Resource overview of the program process, including but not limited to; tracking, rotations, implementation
Apprentice Participant Guide	<input type="checkbox"/> Resource which includes directions and activities that need to be completed per quarter; objectives; supporting resources and timelines <input type="checkbox"/> Includes calendar for rotation and expectations for each
Manager Guide	<input type="checkbox"/> Resource providing overview of program and how to coach and support <input type="checkbox"/> Includes expectations of the Apprentice ambassador/mentor
Job Aids	<input type="checkbox"/> Brief diagrams for tasks <input type="checkbox"/> Check lists <input type="checkbox"/> Rotational summaries
Manager Readiness Training	<input type="checkbox"/> Introduction and preparation for the Apprentice Program <input type="checkbox"/> How to use the Manager Guide
Tracking Tool (SharePoint)	<input type="checkbox"/> Day-to-Day tracking and information sharing
MyLearning	<input type="checkbox"/> System of record for formal completion tracking

Learning and Development

Initial Program Development

- Create content and deliverables for training guides and job aids
- Develop the approach/framework of the rotation program using 70/20/10 principles
- Work with SMEs to identify content and map to each rotation
- Includes Participant, Manager/Ambassador, and Administrator Guides
- Create Manager Readiness Training
- Provide appropriate professional and soft skill courses
- Develops tracking methodology
- Create tool for tracking and information sharing
- Works in a consultative manner with Harper College
- Provides scheduled reports and metrics

Business as Usual

- Maintaining content in partnership with BUs and re-certify with U.S. Department of Labor, if needed
- Track all participants completion
- Committed to future rotations

Business

Initial Program Development

- Act as Subject Matter Experts to build content for rotation program
- Provide support for On-the-Job learning and rotational assignments
- Manager and Ambassador will support On-the-Job learning objectives
- Partner with Learning and Development to deliver monthly participant symposium/workshop
- In addition to following Performance Management processes, manager responsible for certifying achievement of all On-the-Job learning requirements

Business as Usual

- Maintaining content in partnership with Bus
- Verify On-the-Job completion for all participants
- Business is committed to future rotations

Apprentice in Commercial Insurance:

- Zurich, in partnership with William Rainey Harper College, created a two year apprenticeship program
- Participants pursue an Associate in Applied Science degree in Business at Harper College, while gaining industry experience by simultaneously working full time at Zurich.
- Project team includes HRBPs, Recruiting, Learning and Development, and business representation from Claims and Underwriting Services.
- Pilot Launched January, 2016

Current Scope:

- Zurich North America – (U.S. Locations only)
- Limited to Schaumburg
- Framework includes rotations for the following business areas and functions:
 - Compliance
 - Claims
 - Marketing
 - Underwriting Services
 - Call Center
 - Legal
 - Premium Audit
 - Risk Engineering
 - Operations
 - Financial
 - IT

Aspirations:

- Develop a U.S. Department of Labor Certified Insurance Apprentice program that will be leveraged across the industry
- Build a talent pipeline of Commercial Insurance generalists
- Content will be reusable and sustainable, developed with methodology that supports formal and informal learning
- Apprentice will successfully complete all requirements for AAS in Business, fulfill On-the-Job hours requirements, and meet competency requirements for each rotation

High-level timeline we used to launch:

<i>Date</i>	<i>Actions</i>
6/10/15	Develop Training Strategy
6/18/15	Define Insurance Courses
7/1/15	Map Process for Rotations
8/17/15	Create Detailed Training Plan
8/21/15	Begin Design of Program Framework and Tracking
10/1/15	Syndicate Final Training Plan w/ Zurich and Harper stakeholders
12/4/15	Finalize Training Contents & Deliverables