



Revolutionizing Collaboration, Teamwork and Leadership Through the Power of Trust Building®



Voya Employee Benefits Case Study

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SUMMARY

This white paper showcases how Reina's work with our client, Voya Employee Benefits (EB), has enabled them to engage in transformational change—consisting of trust in business, trust in culture and trust in people.

76%

of those assessed expressed an increased desire to work in the business unit

80%

said their trust building journey positively affected their ability to serve their customers

84%

said their trust building journey had a positive impact on collaboration across teams

Among the impressive results achieved together (summarized in the Outcomes section of this paper), our work with Voya EB uncovered powerful lessons and best practices that are fully transferrable to other teams and other organizations.

In essence:

what was shared and learned here is a framework that can enable and support building collaboration, teamwork, leadership and superior service to the customers.

All through the power of trust.

SETTING THE STAGE FOR TRANSFORMATIVE CHANGE

Research by Reina Trust Building®—as featured in their best-selling book, *Trust and Betrayal in the Workplace*—shows that an astonishing 90% of trust-breaking behaviors at work are small, subtle and unintentional.

Trust. It's all about the little things. Trust is an essential, binding element that defines all successful relationships, including those in and across business organizations today. Experts who study human behavior consistently find that trust is the dye that colors how people relate to others—both at work and at home.

At Voya EB, like all organizations, trust determines who they work with, how they work with others, and why people react and make the decisions they do in a wide range of situations.

Rob Grubka, Voya's President of Employee Benefits (EB), and his Senior Leadership team initiated a project called *Evolution of our Business, Culture and People through Trust Building®*. It was a process—one that the group called a journey right from the start—because they sought a transformative process to bring lasting change to the organization. As Grubka explains: “We didn’t expect a quick fix, we wanted to engage and commit to a journey where we create a new work

environment: one where trust building would be practiced every day.” Like all the best journeys, this would be an ongoing one where people continue to make discoveries and grow together from the experience.

Recognizing these vital facts, Voya EB engaged Reina Trust Building®. Together, as partners, we took the first steps of our journey by studying the state of trust within EB: measuring it with proven diagnostic tools and finding bold new ways to build it. The exercise took root and expanded quickly because of the remarkable results it achieved and it evolved into a multi-year trust building journey.

This white paper showcases the insights first published in Reina’s *Organization Trust Assessment Report*, submitted to Voya EB. On the strengths of that report—including its compelling insights and conclusions—this white paper is designed to show that the experience of Voya EB and its executive team is **transferrable**. Other leaders and teams tasked

with solving similar organizational challenges can learn from and apply the lessons learned by Voya EB: to grow confidently, lead staff and deliver improved business impact.

Grouped into three sections: **(1) Challenge, (2) Process and (3) Outcomes**, this white paper showcases the challenges that were at play for Voya EB. It then shows the customized process—adopted by Grubka and Voya EB in consultation with Reina—to measure trust and create a path for successful trust building. Next, it identifies a series of outcomes achieved and lessons learned through this revolutionary trust-building journey.

There are five key insights that were learned through this journey. Each one includes transferrable knowledge that leaders can apply to their own workplaces.

Each is also explained in greater detail in the “Outcomes” section of this white paper. Highlights:

- 1. Trust is everything.**
- 2. Building trust is a perpetual journey.**
- 3. Team insights resonate on a personal level first.**
- 4. Transformative change is a multi-step process where positive leadership has a cascading effect.**
- 5. Trusted leadership is an outcome, not an input.**

Let’s turn now to examine the customized, step-by-step approach adopted by Rob Grubka and his leadership team in partnership with Reina. Working with Reina’s trust-building process, together we have lit a spark that is building collaboration, teamwork and leadership.

CHALLENGE

“You can’t solve your bigger organization problems without first getting the fundamentals right. That means solving your people problems. And you do that only through trust.”

—Voya EB President, Rob Grubka

Upon joining Voya as president of Employee Benefits, Rob Grubka sought to boost profitability and accelerate growth of the group by leveraging greater collaboration and teamwork from every member of the team, including himself.

To get there, he explains, “we had to first tackle a much bigger challenge, which was to change how we—leaders and teammates at all levels—were working together. We needed to own the change and not just manage it.”

While he recognized there was considerable talent, knowledge and shared friendship within this organization, there were obstacles that needed to be overcome quickly. “I was coming to work with a team of people who had worked together and respected one another,” he explains. “And yet, what I was also seeing was a series of barriers holding us back from being able to actually operate the way we needed to achieve our goals.”

What he saw at the **leadership level** was chronic, silo-based thinking. “There was this mindset among our group leaders that their job was to just focus on running their individual department well,” he explains. “When in fact, what we needed was a much more collective focus in our work: to ask ourselves *what do we need to be doing together to run this business well?* We needed a ONE TEAM culture focused squarely on the customer.”

Similarly, and at the **employee level**, Grubka saw a need for a mindset shift. People needed to start seeing one another as being part of a team: to think more holistically as a means of solving larger business problems. “You can’t solve your bigger problems without first getting the fundamentals right,” he explains. “That means solving your people problems. And you do that only through trust.” Greater collaboration and teamwork hinges on getting people to see

beyond themselves and to learn from each other. Within Voya EB, that meant adopting a new way of thinking: a refocusing on seeing business challenges through the lens of the customer first. Grubka adds: “We have to remember that our customer doesn’t see us as a series of departments: they see us as one business and we needed to reframe our thinking and decision making that way.”

SVP of Enterprise Claims and Employee Benefits Operations, Mona Zielke, described the presenting organizational dynamic this way: “we were seemingly working at odds with other internal teams and sometimes felt that there was sabotage happening between us. Many were feeling alone on a team as opposed to working together as a true team. That feeling is not a good one,” according to Mona and as she and other leaders aligned with Rob to begin the trust building journey, she found herself saying “I do not want to go back there.”

Voya’s SVP of Employee Benefits Underwriting, Erik Rasmussen, adds, “there was typical tension between sales and the clients’ needs, and we seemed to be succeeding despite ourselves.” Additionally, “there were too many unforced errors, especially related to continuous improvement initiatives, that we were confident could be addressed successfully through better communication and understanding within a larger trust-based approach.”

Voya EB’s leadership wanted transformational change. One where there is trust in business, trust in culture and trust in people.

Recognizing the full scope of the challenges at hand, Grubka engaged Reina. As he points out: “I knew I could count on them as partners, who would understand our needs and work closely with us to co-create a viable solution.” Having worked together previously, Grubka had faith. He knew Reina’s worldwide, respected, academically field-tested approach to trust building was crucial to solving the challenges within Voya EB.

“I’m an actuary by profession, so I’m a numbers guy,” Grubka explains. “For a lot of people like me, wrapping your head around the concept of trust and of building it is something that starts to make real sense when you can see the data. Because while trust is a feeling, only Reina Trust Building® can give you the facts about trust. So you can also see it, measure it and grow with it.” He adds: “the work with Dennis and Michelle Reina is so enabling because it focuses squarely on understanding and improving the health of relationships across teams and between leaders and the staff they manage. Just as important, they provide long-established, proven tools to help you sustain those healthy relationships, because that’s what you’re going to need if you’re going to get things done well.”

PROCESS

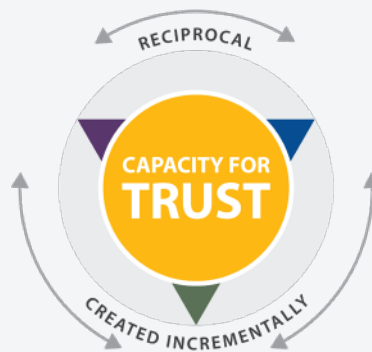
Here at Reina, we describe trust as: **the bridge between the business need for results and the human need for connection.**

To successfully achieve those needs, Voya EB wanted a systemic, repeatable trust-naming, trust-measuring and trust-building process that's been tested and respected worldwide. No quick fixes. By embarking on this trust journey with us, Voya EB gained access to Reina's trademarked structured process for turning facts into understanding.

An effective process starts with having a proven model for understanding behaviors. For Voya EB, that first step was to apply The Reina Three Dimensions of Trust® (see Figure 1), which has been used skillfully by leaders and organizations to strengthen trust and achieve business results for over 25 years. This is a systemic research-based model that identifies sixteen behaviors proven to drive trust. Specifically, the model defines the behaviors driving the Dimensions of Trust: The Three Cs®: Trust of Character®, Trust of Communication®, and Trust of Capability®.

THE THREE DIMENSIONS OF TRUST®

TRUST OF CAPABILITY®
Acknowledge abilities and skills
Allow people to make decisions
Involve others and seek their input
Help people learn skills



TRUST OF CHARACTER®
Manage expectations
Establish boundaries
Delegate appropriately
Encourage mutually serving intentions
Keep agreements
Be consistent

TRUST OF COMMUNICATION®
Share information Give and receive constructive feedback
Tell the truth Maintain confidentiality
Admit mistakes Speak with good purpose

Figure 1

Working from this powerful model, Voya EB gained an ability to (see Figure 2):

- Raise awareness within each member of the organization on how to build a stronger working relationship with each other, including behaviors to practice daily;
- Share understanding and a common language to talk directly to each other about trust in open, honest, transparent and compassionate ways; and
- Identify action steps to solve problems and work together more collaboratively to serve their customers.

TRUST BUILDING® AT WORK

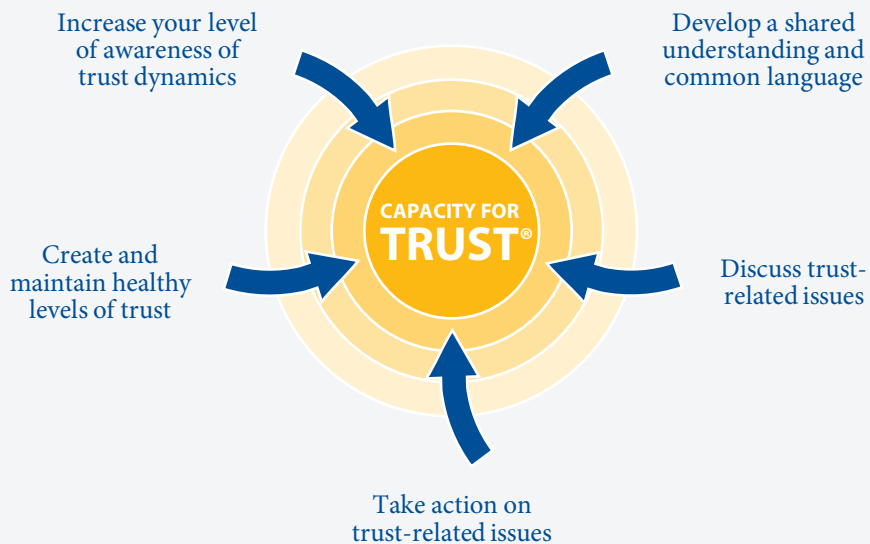


Figure 2

This gave Voya EB leaders and teammates the ability to pinpoint where trust “lives” in the organization. Just as important, it showed everyone involved why

trust matters so much. Equipped with this knowledge, Voya EB was then able to act decisively.

By working with Reina, Voya EB gained full access to the **Reina Trust Building® Systemic Process**: a four-phase approach that established a scientific baseline trust assessment, co-created solutions,

a way to transfer trust building capability from one person/ one team to another, and then progress evaluation to deepen capacity. (See Figure 3)

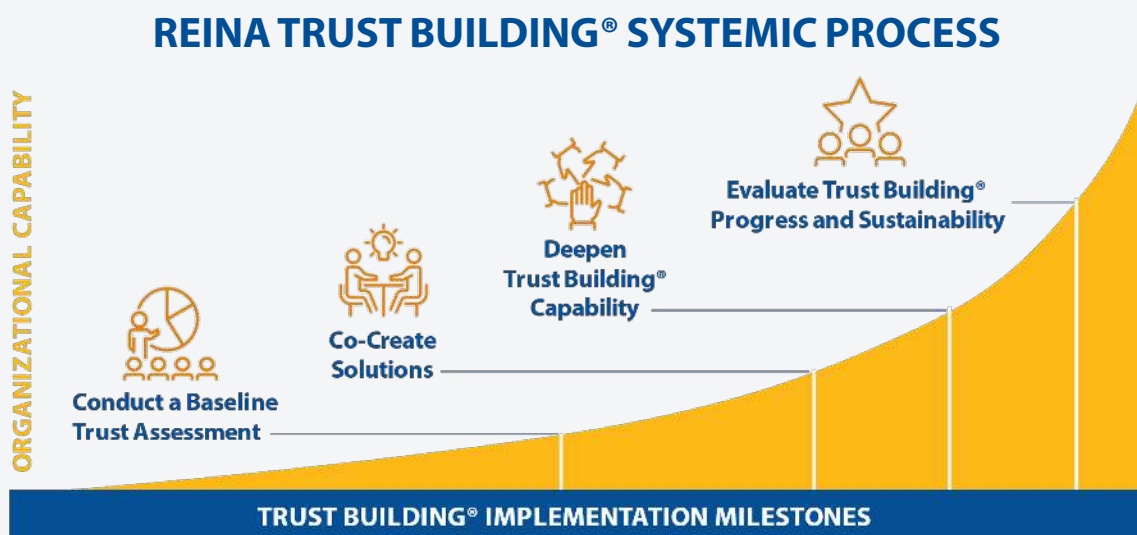


Figure 3

First, the **Reina Team Trust Scale®** was administered to:

- Provide a baseline measurement of trust in teams (i.e., to learn where trust stood on a scientific scale consisting of four levels—very low, low, moderate and high).
- Understand foundational strengths at play that support healthy pockets of trust.
- Identify areas of struggle and greatest areas of opportunity to strengthen trust, and
- Pinpoint behavioral areas of focus that, when worked on together, drive progress.

Team *Trust Scale Trust WorkOuts*® were facilitated by Voya EB leaders, for 20 distinct teams. It was at this point that every team in EB received unique feedback reports, and learned the level of trust on their team. Every team member gained awareness about trust building behaviors and in subsequent *Trust WorkOuts*® gained new skills and tools to practice. Team members were able to apply that learning immediately and these applications were the *game changer*.

The Team Trust Scale feedback was what sparked mutual understanding of where trust stood, and launched EB’s trust building journey. From this point forward, everyone worked on trust *together*. Since it was essential that collaboration be fostered and the culture become one team, Trust Cohorts were developed. These consisted of people from a blend of departments and units.

Teams engaged in *Trust WorkOuts*® for over a year focused on three specific behaviors, gaining skills and tools to learn how to practice these behaviors daily:

Managing Expectations	Giving and Receiving Feedback	Speak with Good Purpose
Trust of Character	Trust of Communication	Trust of Communication

These *Trust WorkOuts*® were led by EB leaders who engaged in sessions with Reina to learn the content and to prepare to lead it for their people. A total of 35 leaders worked together to lead 25 cohorts. In doing so, they took trust and put it into action.

SVP Mona Zielke noted that “we now had a vocabulary with which to speak with one another and created a space where everyone was on a level playing field. We got into the same room. Our titles didn’t matter, but the outcomes did. Being able to have these rich discussions peer-to-peer brought us all closer together. We hadn’t had these types of conversations before. These happened through trust building and were ultimately aligned to how we both work better together and create the best possible outcomes for our customers.”

In the next step in this journey, Reina conducted an **Organization Trust Assessment** with Voya EB staff and leadership. This entailed:

- Engaging more than 125 people through focus groups and interviews.
- Conducting a pulse check on current health of trust in the EB group.
- Identifying gains and progress made and the most significant contributors to progress.
- Knowing backsliding signs where trust may be eroding, and understanding continued areas of struggle; and
- Discovering steps to improve and strengthen the journey moving forward.

OUTCOMES

“Where we thought there would be trust erosion, instead we found trust was stronger than ever. We were stunned.”

—Voya EB President, Rob Grubka

On the strength of the progress made in building trust during the first three phases of their journey (as described in Figure 3), Voya and Reina regrouped to conduct its Organization Trust Assessment, along with focus groups and additional interviews. This work was based on Reina’s Organizational Trust Scale, which is scientifically proven, is based on more than 25 years of research on trust, and is psychometrically strong, valid and reliable—all giving leaders high confidence that they were on solid ground.

The outcomes within Voya then went from being satisfying to being astonishing—a deepening of trust within the group and trust in leadership. And it happened, paradoxically, at a time of significant change within

Voya (i.e. cost-cutting, restructuring, scaling back and strong growth in customers). At a time when trust in communication, leadership and capabilities would typically have been questioned in a group, all three of those qualities within EB were fortified. The group got better, stronger and more confident.

As EB President Rob Grubka explains: “when we set out to undertake the Organization Trust Assessment, we expected there would be some backsliding because some time had passed since the group had engaged in a Trust WorkOut®. Where we thought there would be trust erosion, instead, we found trust was stronger than ever—and that was a significant change. We were stunned.”

Key Highlights of the Organization Trust Assessment Results:

Of the 643 people invited to complete the OTS, 578 responded—a **very strong 90% response rate**. This showed there was a deep commitment within EB: people had confidence that their efforts wouldn't just go into a black hole. They spoke and then, they saw action.

Trust increased across the board from within EB over a two-year period. That included significant increases across all three Dimensions of Trust - Trust of Communication, Trust of Character and Trust of Capability. That became the foundation under everyone's feet and provided new energy for more growth.

People within EB trust what they are hearing from their leaders more than ever before. Of the three focused behavior areas (of the 3Cs), Trust of Communication showed the biggest increase. That meant that people knew they would be heard, understood and listened to. They felt safe to speak openly and honestly.

The level of trust within EB was ranked by Reina on the high end of Moderate, representing a healthy level of trust. This was recorded during a period of considerable organizational change. Trust scores were much higher than what are typically recorded. It underlines EB's hard work to transform their culture based on a foundation of trust.

Leaders were perceived as having an even higher level of trust than employees. This too was recorded during a period of considerable organizational change when typically there is a slippage in leadership trustworthiness.

Improved trust levels had a direct influence on employees and leaders alike on how they felt about working at Voya EB and serving customers.

An astonishing three-quarters of respondents (**76%**) said their desire to work at EB grew as a result of trust building work together. And **80%** said that their trust building journey together positively affected their ability to serve their customers.

Teams flourished through trust. A full **84%** of respondents said their trust building journey had a positive impact on collaboration across teams. They had a better understanding of each other's work and of how to support each other to serve customers.

As result of this trust building journey, Voya EB accomplished and exceeded key business goals they set out to address. The EB organization addressed profitability and growth measures successfully. Staff and leaders are collaborating better than before. Teams are more effective. Leaders are listened to and believed. People feel confident about the work they do and how they serve their customers. All of this has been accomplished through the power of trust: measuring it, understanding it, building with it and growing with it.

From Erik Rasmussen, “the paradigm has shifted toward stronger team relations, true cooperation and productivity. In the spirit of communication and transparency more leaders are readily admitting mistakes and we have come a long way in eliminating rationalization, a manager and leader trap which we can’t afford to fall into, especially during this time of unprecedented change.”

Mona Zielke adds, “there is pride across the business that we took on this important developmental work. We feel lucky to have a leader that cared enough to push for positive change and I feel my ability as a leader has been stretched in a very positive way.”

INSIGHTS THAT CAN BE APPLIED ELSEWHERE

The trust building journey that Voya EB President Rob Grubka spearheaded and then embarked upon with his staff resulted in revolutionary changes. It shows how a steady process of sowing the seeds of trust can bear an abundance of goodwill, openness and transformative change over the longer term—even during times of great uncertainty.

The skills gained and lessons learned by this group are transferrable. That is why the following five insights have been collected based on their incredible journey, so that the teachings can be applied in other organizations.

INSIGHT 1

Trust is everything, is the starting point and “begins with you.”

Astonishing levels of trust can be earned and sustained—even through challenging periods of intense organizational change. With change comes uncertainty: a step into the unknown where doubt and anxiety replace certainty and confidence. Trust mitigates those tendencies. When achieved during difficult times, it has the surprising effect of boosting levels of trust in leadership. Trust building is also an inclusive process: it involves every member of the organization. As we reminded the Voya group in many sessions: “trust begins with you.” This approach fuels a team to reach organizational goals successfully together.

Working with the Reina Three Dimensions of Trust model and a systemic process for trust building, participants gained a common language and new vocabulary to communicate their needs and to listen attentively to the needs of others. Just as important, the greatest beneficiary of trust building was the EB customer.

INSIGHT 2

Building trust is intuitive, measurable and enabling.

When you measure trust and are given the tools and skills to practice building with it—working from a field-tested, globally respected process—organizations, teams and individuals gain the ability to grow like never before. That includes boosting organizational profitability, efficiency, engagement and effectiveness at the same time as group collaboration and leadership confidence. When you measure trust, you know where it stands in an organization: no more guesswork, no more assumptions. You gain facts to know exactly what to work on.

As Grubka points out: “with the Reina approach, you don’t just feel trust or just feel the difference when trust is growing, *you see it*. The proof is in the numbers and you can then appreciate how much things have changed. This has changed peoples' lives both at home and at work.”

The outcome of embarking on this kind of trust building journey results in a deeper sense of enablement. That means you enable higher performance out of your people in a way that’s meaningful, positive and sustainable. As one EB employee concluded: “*We have a better personal understanding of each other and are more willing to give each other a little grace. We empathize better than in the past. We still try to accomplish too much with the manpower we have, but it's more of a united team approach than it was in the past.*”

INSIGHT 3

Team insights resonate on a personal level first.

Raised awareness is at the core of trust building. What is learned and applied on a professional level must first be experienced at a personal level. That is especially true about trust and trust building, where the lessons come from understanding the needs and experiences of others first. Here's another piece of feedback received from an EB employee: *"It has caused me to examine the way I interact with my fellow employees on a daily basis. If I perceive an unrealistic expectation, I try to renegotiate earlier. I try to have a positive attitude and be forgiving and transparent. I have been trying to avoid gossiping. I think it has helped with the overall culture and collaboration across different teams."*

"The thing about trust building and change," Grubka explains, "it usually takes the shape of everybody wanting everyone else to change...and that's backwards. Change starts with us. It isn't a spectator sport. It's something where you have to be accountable first. And that's one of the first things you learn in this process." As result, the change that occurs at a personal level becomes the fuel that propels change at the broader business level, helping Voya connect better with customers.

INSIGHT 4

Transformative change is a multi-phase process where positive leadership has a cascading effect.

Trust is reciprocal: built step by step by people practicing compassion for each other. They trust in how they can grow together. In turn, they trust their leaders more than they did before. They want to work for and want to produce for leaders they trust. When trust is present, they will go the extra mile for one another.

In the Voya EB experience, trust building is a process. It started as a single exercise, followed by more practice for developing trust. As a result, a compounding effect took hold. This is best seen in the feedback provided by participants in this process. One employee noted, *“Because of my role, I’ve been collaborating across teams in EB for years. I can honestly say that things are different now. People are speaking up in meetings more often and are offering their thoughts and opinions. It is so refreshing and nice to finally be getting input from others.”*

By learning about the importance of trust, gaining an understanding of how it’s earned and lost, as well as the communication tools to make trust grow, learning opportunities become exponential. Teams of people grow in confidence because they are now in service to each other. Leaders become teachers. But on an even deeper level, behavioral change instills a greater sense of leadership in every member of the team. As Grubka points out: “I am incredibly proud of what our team has done in taking accountability and taking ownership of their work in this journey.

INSIGHT 5

Trusted leadership is an outcome, not an input.

When you treat your own leadership skills as an outcome—shaped first by a process of understanding in yourself and of others—your potential for success grows. For leaders who lead with trust, they do so from the inside out. They first grow in their self-awareness. Then what emerges, is the ability to trust themselves.

“As a leader,” says Grubka, “I work hard to ensure every member of my team understands what they are being tasked to do and the team is aligned in ways that support each other.” Having a holistic view of leadership means that you need to start by getting an accurate read of the land under feet before you begin to explore that territory.

Trust building for leaders means that you start by listening and understanding those around you. You model it, you practice it, you communicate with purpose. *You live it.* You set the example for others. And then, you respond compassionately. When you treat your own leadership skills as an outcome—shaped first by a process of understanding—your potential for success grows.

CLOSING

Trust enables an organization to move faster. But it does so only when its trust building process is ongoing—a constant journey.

There are no shortcuts to building stronger relationships with people. And as Rob Grubka and his leadership team discovered:

what emerges from this process is a differentiated team that is a mighty force to be reckoned with in the industry.

About Reina Trust Building®

Reina has been researching trust, measuring trust and building trust in leaders, teams and organizations as its sole focus for nearly 30 years. Acknowledged as the global pioneer and leading provider for this important developmental work, Reina is appreciative of its enthusiastic and global client roster, an expanding international group of Master Practitioners, and the growing, urgent need for its services, especially as organizations everywhere seek to define their “new normal.” It is imperative that rebuilding your business must begin with trust.

Learn how Reina can support you:

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About Voya Financial

Voya Financial, Inc. (NYSE: VOYA), helps Americans plan, invest and protect their savings — to get ready to retire better. With a clear mission to make a secure financial future possible — one person, one family, one institution at a time — Voya’s vision is to be America’s Retirement Company®. Voya’s three core areas of business focus are Retirement Products and Services, Employee Benefits and Investment Management.

Voya.com



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