



 nsurance

You can implement an RRI to accomplish most any organizational goal. For example, you could launch an RRI to focus on:

- Growth
  - Develop a strategy for entering a new market
  - Grow sales within an existing market
  - Build teamwork across businesses
- Profitability
  - Improve selection of new more profitable business
  - Create new or revised products with improved margin
  - Expense Management
  - Improve efficiency of an existing process
- Talent
  - Demonstrate effective Sponsorship Skills
  - Develop Skills through team leader, facilitator and team member roles
  - Build teamwork among team members
  - Practice decision making, project management and communications skills

## How Do You Help Ensure RRI Success?

As I already said, it's critical that you secure management buy-in to ensure success. Without it, any RRI effort could be doomed to fail, especially one that spans the organization involving team members from different businesses and functional areas. I've found RRIs are easier to run when you control all of the resources needed for a team, but that rarely is the case. So make sure you get that buy-in first!

Management buy-in includes making sure that the individuals in charge of the needed resources understand and support what an RRI is about. It's vital they know both the strengths and limitations of an RRI. You can use information in this article to help develop your own pitch to management so they know what's expected of them, the organization and the RRI team.

When making your pitch, be prepared to talk about your sponsorship statement in detail (more on that later), the team you have in mind for the RRI and what you expect the organization to be able to gain from the RRI's outcome.

You also need to be sure that your RRI team members will be given the necessary time needed to participate fully in the RRI. Getting cooperation from supervisors is, of course, a lot easier to get when you have upper management buy-in.

## Philosophy Behind the RRI

The big operational advantage to the RRI is its short time frame—90 days, no more. This short duration accomplishes a couple of things. First, it makes participation manageable for all team members, and their supervisors/departments. Second, it helps position the team to deliver a quantifiable result.

People, regardless of function or level, tend to have a hidden reserve of capacity that they can draw upon, when needed. This is especially true when stress is present, i.e. a short 90-day deadline.

When projects have long or indefinite time frames, a natural human tendency is to procrastinate or lose focus. Because of the RRI's condensed format, there is zero room for either.

Another critical aspect of the RRI process is the presence of what are called “Zest Factors.” So what in the world is a Zest Factor?

The RRI is a Must-Do project and the participants have a short time frame to bring forth the expected result. As a result, the team members feel:

- Challenged and empowered
- A sense of urgency
- Excited, like taking part in a game
- Driven, stakes are high
- Success is near and clear
- Sense of accomplishment

In addition, the Zest Factors inspire the RRI team members to:

- Work as a cohesive team
- Ignore red tape
- Question assumptions
- Challenge potential outcomes
- Experiment to quickly determine what works (and what doesn't)
- Transcend functional and hierarchical boundaries

And what's the ultimate result of all of this? The RRI drives change at a rapid pace.

## How do you set up an RRI?

Now let's put first things first. Before you can assemble your team you need a clearly articulated Sponsorship Statement. If you didn't write a Sponsor Statement to sell the RRI to your organization's leadership, you'll need to do it before you assemble the RRI team.

### Crafting the Sponsorship Statement

The Sponsorship Statement is a one page letter where the sponsor clearly outlines what the team should address in the RRI. The first paragraph should articulate exactly what the sponsor sees as the facts, issues and possible opportunities for the team to explore during the RRI. The second paragraph should be worded as a challenge to the team to help the sponsor determine the best solution to address this opportunity. Finally, the most important piece of the Statement is to ask the team to generate a real and meaningful result in less than 90 days.

### Picking the Team

RRI teams should not be too large; 5-9 members is about right. Your goal selecting the team is to learn something from them in less than 90 days, as they focus on generating a result. You need the right people with the right skills, knowledge and experience. Your well-written Sponsor Statement will serve as a guide when you get down to the task of selecting your team members.

If you can, and if appropriate for the RRI, include high potential, high performing colleagues within your organization. An RRI is

a perfect place to help them develop their leadership skills and gain broader exposure to various levels of your organization's leadership and management.

### Kicking off the RRI

A formal RRI launch session is important. It can be in-person or virtual via conference call or online meeting; however virtual works best if the team members already know each other. You should figure on this initial meeting taking from 4-6 hours. Here are some important aspects of the meeting:

- Be sure to select and brief the Team Leader and Facilitator before the launch session. The Team Leader is responsible for the results of the RRI. The Facilitator is responsible for ensuring that the RRI team stays on task, collaborates, continues to make progress aligned with the RRI objective and to escalate any obstacles to the Team Leader and/or Sponsor.
- The sponsor should attend the RRI Kick off. The team has to know who the sponsor is and understand his/her role (especially how the sponsor will help the team). It is at the RRI kick off meeting when the sponsor creates the sense of urgency & related zest factors.
- Devote an hour to explaining the RRI concept before you do anything else at the kick-off. Not everyone will have participated in an RRI and all team members need to have a clear and consistent understanding of what an RRI is (and isn't) before diving in.
- Thoroughly explain the RRI goal setting funnel (figure 1) so the team can efficiently narrow the scope of their collective results focused goal for the RRI
- Allow at least 2 hours for the team to discuss the Sponsorship Statement and brainstorm possibilities. Plan on an additional hour for the team to use the goal setting funnel to narrow down their result-focused goal, using the funnel. The goal should be a stretch, not a slam dunk. It should be something the team can sink their teeth into.
- Once the Goal is agreed upon, the team must develop their initial work plan. This will allow them to take immediate actions toward achieving the RRI goal.
- Before the end of the meeting, agree on the date the team is to deliver its final report. This should be done as close to 90 days from the kick-off meeting as possible. As the sponsor, you should ensure that any required attendees know the general timeframe for the report in advance with tentative holds on their calendars. The facilitator will have less of a challenge getting those key people booked.
- At the conclusion of the launch session, the team should be positioned to report out the RRI goal to the Sponsor.
- The team should schedule recurring RRI status meetings either weekly or semi-monthly (as appropriate) to ensure consistent progress is being made on the plan itself and any specific action items. Meetings should last no more than 30 minutes.

### Sponsor's Role

Once the Sponsorship Statement is written and the project is launched, the best thing the Sponsor can do is get out of the way until he or she is needed. Be sure the team knows that the Sponsor's key role is to support their efforts and to help clear

paths, get access to resources and answer questions—the RRI team needs to know the Sponsor has their collective backs. It's critical that the Sponsor follows through on whatever he or she commits to do. If it simply can't be done, the Sponsor must provide the team with an explanation why. The better the Sponsor supports the RRI team, the greater the odds of success and the easier it will be to recruit RRI teams in the future. The success of an RRI is contagious and others will want to participate in a future RRI as a result.

### RRI Goal Setting Funnel

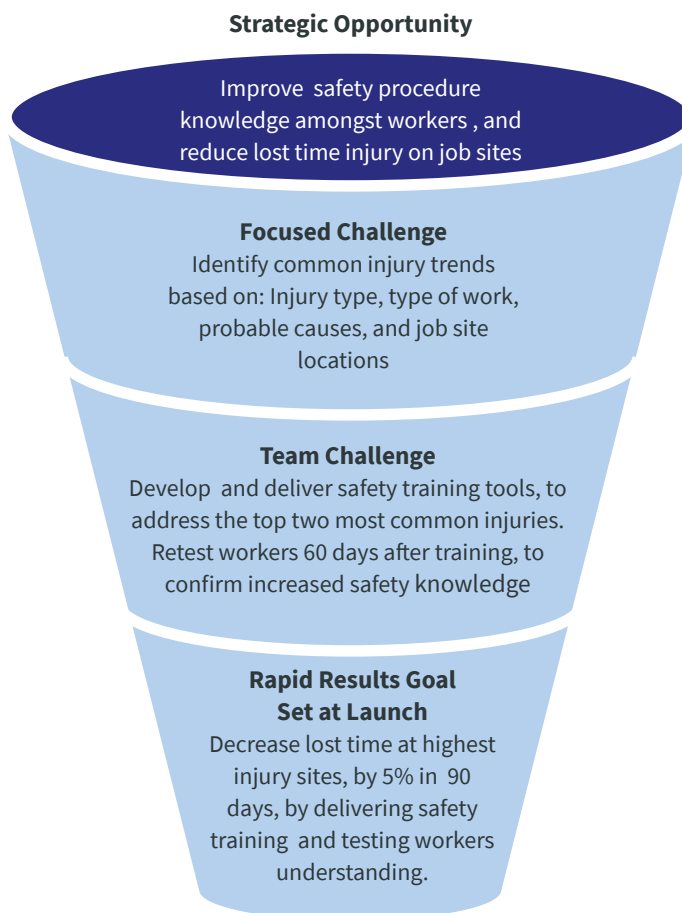


Figure 1

### Team Responsibilities

As previously mentioned, the RRI team needs a Team Leader and a Facilitator, both of whom also participate as regular members of the team.

#### Team Leader

Just like it sounds, this person provides internal leadership and guidance for the team. The Team Leader's key responsibility is to keep the team on task, following the agreed upon work plan, to meet the 90-day deadline. The Team Leader is also the liaison between the team and the Sponsor. This is a great role to use to develop your high potential people.

#### Team Facilitator

This person is the team operations coordinator and project

manager. He or she assists the Team Leader with logistics; like scheduling meetings, printing documents, booking meeting rooms, arranging conference calls, encouraging participation from all team members, locating additional resources and so forth. The Facilitator's most important tasks are to understand the basic RRI process and framework, and to help the team establish the results-focused goal and execute on the project plan.

Once the team's goal has been achieved, they will present their final results to the Sponsor and anyone else they, or the Sponsor, feel should be present. It's also advisable to have at least one or two interim reports. These informal reports don't need to involve the whole team, but they certainly can. Interim reports will help both the team and the Sponsor avoid any unpleasant surprises.

### Possible Construction Industry Uses for RRIs

- Implementing (or changing) BIM or other systems
- Mergers & acquisitions
- Expanding operations in a new region
- Changes in services or capabilities
- Improving Risk Management Practices
- Implementing new Safety practices

### Possible Insurance Industry Uses for RRIs

- Improve Profitability – Analytics projects from Data Work Outs
- Reduce Expenses by improving Productivity – TOM 1 & 2 projects
- Grow Profitably – Geographic, Broker and Target Account focused projects
- Develop Future Leaders – Empowerment via Team Leader and member assignments
- Drive Innovative Culture – P3 Plus project
- Create & Launch new Services – Claims, Risk Engineering, Premium Audit
- Shift Mix of Business – Portfolio Tiering, Segmentation Optimization
- Partnering with Broker – Network 36 projects
- Develop new Tool and Roll Out – GUP
- Build teamwork across businesses – Cross Sell, Grow Atlanta

## Wrapping Up

When the RRI team completes its work, the last big piece is the report meeting. The RRI Sponsor should ensure the availability of any key management when the RRI is launched. But the Team Facilitator will handle the rest of the logistics for the report meeting.

Ideally, the RRI team will present in person. But if that's not possible because of your organization's size or geographic distribution, then a teleconference will work. The Facilitator will be responsible for arranging the logistics for either the report meeting or teleconference. He or she should confirm that all team members have presented on a teleconference. If not, practice time should be allocated so everyone is comfortable with the process. Additionally, all RRI members responsible for giving the report should be familiar with whichever teleconference system is chosen (e.g. GoToMeeting, Lync, etc.). This is a big opportunity for the team to shine as they report their results and lessons learned to senior leadership and they shouldn't have to worry about not being comfortable with technology.

The Sponsor should definitely attend the report meeting. The Sponsor's role should be to simply introduce the team and then immediately turn the meeting over to them so they can have the spotlight. After the team delivers the final report, share their successes and lessons learned with the rest of your organization. Depending on your company's structure you can do this at an all-employee meeting, in an email or even in an internal blog post. This kind of visibility serves two basic purposes:

- it helps to reward and recognize the RRI team
- teaches other members of your team about RRIs
- When your teams get attention and credit for their efforts, you won't have to twist arms quite as hard when recruiting for future RRIs.

Lastly, have a party. It doesn't have to be a big or expensive party, but celebrate with the team in some way to recognize the RRI result. Seriously, this part is important.

## Next Steps

Soon after the report meeting, the team should sit down to document lessons learned. These might be related to the crafting of the sponsorship statement, meeting logistics, goal setting, internal obstacles, etc. The team should document anything they think might help future RRI teams be more productive. These lessons learned should be shared with future teams during their kick-off meetings.

It might seem obvious, but the most important thing you can do for the team is to take action on their output. Frankly one of the surest ways to kill the effectiveness of RRIs is for the organization to do nothing with the team's hard work. Depending on the nature of the work the team does, follow up may include handing off to another team, department or rest with the company leadership team.

In some cases, one RRI may spawn ideas or generate the need for follow-on RRIs. In which case, sponsors need to be identified and teams recruited (following the steps already outlined). As your organization continues to use RRIs, be sure to spread team

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