

A case study: Successfully communicating a new culture, harmonized benefits after a merger



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Two companies, two cultures, one new benefits package

Two family-owned beverage companies merged to form North America’s largest wine and spirits distribution company. As they came together, there were challenges to overcome, including harmonization of benefits plans and carriers.

The newly formed company’s goal was to provide and maintain competitive benefits for all employees. They hoped to leverage their buying power to harmonize plans and vendors without cutting benefits or causing disruption. They also wanted to reduce complexity and eliminate gaps in coverage.

The stakeholder group is composed of approximately 22,000 employees in 45 states and the Caribbean. Both legacy organizations were privately held and family-run; however, their cultures varied greatly from paternalistic and change averse to family-oriented and transformational.

Changes for all

As the company and Milliman teams began working together, they considered the current climate, the benefits, and the enrollment process. While employees had received a barrage of information about changes due to the merger, nothing had been communicated about benefits. This information gap left people anxious about the coming changes. And in 2018, all employees would experience some form of change, whether it be the enrollment process, the benefit plan, or the carrier.

Thus, the communication campaign needed to reassure employees that they would retain great benefits, help them understand the new package, and ensure they made active, online elections.

Results delivered

Overall goals were to build awareness and understanding of benefit changes, help people make informed decisions by comparing plan features and total costs, and drive employees to actively enroll online by the deadline. Here’s how we met our specific objectives.

OBJECTIVE	RESULTS
Support the company business goal of leveraging benefit buying power due to harmonization to decrease overall benefits spend.	Company saved \$12 million in 2018 on benefits spend.
Lead 90% of employees with medical coverage in 2017 to enroll online by the deadline, considering that over 70% of employees (all Company A employees) had never before completed online enrollment.	99% of employees with medical coverage in 2017 enrolled online for 2018 benefits by the deadline.
At the locations where meetings and live webinars were offered, have at least 20% of employees attend.	24% of employees attended a meeting or live webinar, where offered.
To demonstrate awareness and engagement, encourage employees to utilize new resources (help desk and/or enrollment support center).	New resources were highly utilized—39% of employees called the help desk and/or enrollment support center during the enrollment period.

While the numbers speak for themselves, hearing from the people is the proof in the pudding.

“ This is the best change management effort I’ve seen since I’ve been at company. Between the emails, the posters, the intranet, the videos, etc., it has all been very well done. Or I should say ‘top shelf’... ”

“ I thought your presentation was one of the best I’ve heard concerning health benefits and the pros and cons. It was clear, concise, and easy to understand. ”

“ This video is a WOW! ”

Grounded in strategy

Working with the company's HR team, we developed a multimedia communication strategy. Our strategy included objectives/measurement, audience analysis, key message platform, approach, deliverables (print, email, intranet, videos, presentations, and face-to-face meetings), project plan, and look and feel. This strategy was our true north. It guided our process, ensured consistency, and provided a common platform for this complex project.

Supported by theme

We developed a theme to highlight the business and reinforce that we are better together: A Fine Blend. Our people. Our organization. The design was celebratory, warm, welcoming, and friendly. Photography was people-centric, using company-provided employee and product photos, and supported by industry-inspired imagery and object photos where appropriate. The color palette included vibrant, warm accent colors that supported the company's primary corporate color palette.

Tactical approach

Our approach included the following tactics.

- **Reassure.** Show employees that while there are many changes, most are positive.
- **Cut through the clutter.** Break down content into "need to know" and "need to do" elements.
- **Inspire action.** Include a clear call to action, and appeal to scanner and linear readers.
- **Keep it in the family.** Reinforce culture and diversity and link company values to the benefits program.
- **Repeat to retain.** Repeat consistent key messages across all deliverables.
- **Know the language.** Use a conversational tone with no spin and add humor where appropriate. Employ clever plays on words with beverage industry phrases.



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