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LuAnn Heinen:

That's Allison Green Johnson, senior vice president, chief diversity officer, and head of culture and engagement at Lincoln Financial Group, a fortune 200 company that has strengthened its commitments to social justice over the last year. A graduate of Spelman College and Howard University, Allison is a trailblazer in her field and was recently recognized by *Profiles in Diversity Journal* on its 2020 Black Leaders Worth Watching list. A further testament to Allison's leadership, our awards distinguishing Lincoln Financial Group as a top employer for women, diversity, and for disability inclusion.

I'm LuAnn Heinen and this is a Business Group on Health podcast, conversations with experts on the most relevant health and well-being issues facing employers. My guest is Allison Green Johnson and our topic is the role and impact of diversity, inclusion, culture and engagement in a major financial services company.

Allison, welcome to the podcast.

Allison Green Johnson:

Thank you. Glad to be here.

LuAnn Heinen:

Allison, you're in what *Fortune* magazine called one of the hottest jobs in corporate America and that's chief diversity officer. About half of the S&P 500 companies have a CDO or equivalent, but in addition to that job, you're also head of culture and engagement. That's a really interestingly broad role combining two significant functions that in many organizations are separate and potentially siloed. How's that going? Do you have peers in the Fortune 500 and just any thoughts about that broad role and how it goes?

Allison Green Johnson:

Thank you. I do have thoughts about it. I think it's a fantastic combination. When you think about the diversity, equity, and inclusion function, we're looking at ensuring there's equity in all we do and how people experience the organization. It takes into account differences of others, their backgrounds, perspective, experiences, etcetera, and leverages those differences to ensure we achieve successful business outcomes or results. When I think about culture and engagement, it's the extent to which we empower employees to feel pride in the connection to their work and their role and that there's a commitment to the organization. When you think about leveraging our differences and sharing equity and then having pride in an organization and feeling connected to an organization, it seems like the perfect compliment.

LuAnn Heinen:

Let's pick up on engagement. Obviously, the engagement of historically marginalized minority employees is a priority for the organization. What are some of the ways that Lincoln is driving engagement?

Allison Green Johnson:

First, when I think about driving engagement, let's talk about how we measure it and how we've come out on that measurement. We have a biennial survey for our entire enterprise around engagement and there are four areas that we consider our factors for engagement. One is retention, another is effort, advocacy and pride. We work to ensure that on all four of those levers that our employees are connected. Connected employees definitely want to stay with your organization and recommended it. Effort, they go above and beyond. Advocacy, they recommend the organization is a great place to work. Then having pride and passion for the organization, for the work and for the mission. When we think about that, what I'm really proud of around engagement is not only did we hear from 95% of our population when we sought to measure it, but what they

said around it was that they were very connected on all those four areas, but what they want to see more of, especially now, and you're probably hearing other companies talk about this, employee well-being. As we transitioned to work-from-home and got accustomed to it, work can consume quite a bit of your day. We're continuing to drive efforts to support employee well-being, as we think about the future and the ways in which we work, how we recognize individuals, how we recognize teams, as well as thinking about what the skills of the future will look like in a new environment.

LuAnn Heinen:

I'd love to get back to employee well-being, but sticking with engagement for a moment, how do your engagement scores vary by race and ethnicity? Did that help you identify areas of focus?

Allison Green Johnson:

When we look at the overall index, they're very close. We find that while there's not an exact mirror, they are very close and statistically there's not a difference between the two. Where we see our biggest opportunity, I would say, for everyone there's variation, as you think about the various dynamics around diversity. As our company continues to grow, how do you navigate your career and especially how do you navigate it in a remote environment? How does networking work now? How do I stay in touch with people that I want to meet that aren't a part of my daily routine? We're not seeing them in the hallway or seeing them at lunch in the places that we gather, so how do we continue networking? What's interesting when I think about different segments of diversity, we have business resource groups and what's been cool about our resource groups, and I'll use one in particular, our Latino Business Resource Group started to just have lunch and learns and invite people on their lunch hour to join in, share recipes, cook that recipe, and let's talk about it. What we saw, and this is a great example of something organic, they said we're seeing our family for the majority of time, we're at home, and then we see our teammates. It would be great just to network and see others and they started this and it's grown. What they like about it is not only chatting and eating with folks outside of their family, but actually learning about others in the business, whether they're Latino or an ally.

LuAnn Heinen:

Is that on zoom?

Allison Green Johnson:

Yes, we use WebEx.

LuAnn Heinen:

Do you look at disengagement and make efforts from that angle to understand what's driving any disengagement and would your work to try to overcome that be different than what you're doing to support engagement?

Allison Green Johnson:

We very much look at it. From a measurement standpoint, there's highly engaged, engaged, on the fence and disengaged. On the fence and disengaged is where we do pay attention and understand what the significant differences between those that are engaged and highly engaged and those that aren't. We hear quite a bit in the narrative of the survey, as well as you can look between the scores, too, to understand. What we do with that information is share it with our talent partners, our total reward partners, with communications, to begin to say, okay, what do we need to do to help to transition and/or better understand movement towards engagement.

LuAnn Heinen:

Let's pivot to how the acts of all the racial injustice that played out on the national stage in 2020, how did that affect your work?

Allison Green Johnson:

You used an interesting term, pivot, because that's what it did. Immediately after witnessing the horrific acts of both Amy Cooper and George Floyd, that week we brought the organization together to have meaningful, and what we call crucial, conversations around race. We learned so much in those conversations that we continued them across the organization in numerous ways, from senior leadership throughout the organization, and even developing kind of a toolkit to continue to have those conversations. As the conversations were happening, our senior leadership and our Board said what is it that we need to do to create sustainable change that will embrace racial justice in the company and impact the country. We decided on eight commitments for Lincoln that span the workplace, marketplace, and community that we felt would begin to embrace and address racial justice. I'd be happy to walk you through those.

LuAnn Heinen:

Maybe run through all of them top level and then we can dive into a couple of them.

Allison Green Johnson:

Here are three that immediately come to mind: we have tied executive compensation to diversity, objectives and metrics. Another is increasing our minority leadership population by 50% over the next three years, with the focus on our black leaders, and increasing our minority population overall.

LuAnn Heinen:

Really impressive. I'd love to tackle executive comp tied to D&I metrics. That's something people talk about, but I don't know it's very frequently done.

Allison Green Johnson:

What I'm really proud of is that we engaged an executive compensation consultant to do an analysis and an assessment of all of our practices and what we've done in the past, looking at our growth from a business perspective where there are opportunities. We wanted to go deep to understand root causes for what could enhance growth in leadership and what incentives look like that were tied to what was most important. We learned a lot about our recruiting practices. We learned a lot about what were enablers and what may be barriers in the organization for growth. Based on that learning, we were able to create an incentive design in our LTIP program that would tie long-term incentives across the senior-most leadership to specific diversity and inclusion kind of objectives. We're looking to not only with our LTIP, but there's an opportunity with our annual incentive program, as well, and looking at behaviors.

LuAnn Heinen:

Long-term incentives, meaning stock options?

Allison Green Johnson:

Stock options, performance awards, right. What I'm really proud about is this executive compensation tied to diversity metrics is baked into our long-term incentive practice. It's not leader dependent and sometimes a leader will come in and say, this year we're going to have a target around our pay tied to diversity objectives. It's not leader dependent. This is something that was voted on by our compensation committee and adopted by the board of directors and is now institutionalized in our practices.

LuAnn Heinen:

That terrific. Have you had enough opportunity yet to see impact or is it relatively new?

Allison Green Johnson:

Well, we just rolled it out and it's over three years. We track it and follow it and communicate on it. We will every quarter.

LuAnn Heinen:

I'm also interested in the barriers that were identified by the compensation consultant, how to help executives do better when it comes to D&I metrics.

Allison Green Johnson:

I think we learned a lot about unconscious bias that can inadvertently show up. One way we have decided to address that is through what we consider to be balanced slates as a part of our recruiting practices and having slates of candidates. What I'm really proud of is that we're providing opportunities internally and externally for people who meet the requirements of the job to be considered.

LuAnn Heinen:

Yes, that's commendable. Anything else about increasing minority leadership? I think you said that was at the assistant VP and above level and how long has that goal been in place?

Allison Green Johnson:

These were part of, as we talked about earlier, what we were doing to address racial justice, this is part of our eight commitments. When we think about other opportunities, there are three ways to grow. There's recruiting, there's talent mobility or development, and there's retention. You need all factors in play. What we set out to do was ensure we were introducing new practices in all areas. Start with the talent mobility development piece and understanding the talent that's in the organization. We conducted specific talent reviews to understand and think through and talk about what was needed for movement, growth, development opportunities. What I have found and what we're doing is really peeling back to make sure that in everything that we do, diversity is a part of it. We've done something I'm really proud of from a retention standpoint. We hosted our first ever minority leadership summit. We've had women leadership summits, they're focused on empowerment, career growth, and we leveraged that for our minority leaders. What an opportunity to celebrate, provide visibility, and just acknowledge the talent that we have. It wasn't just for minority leaders, it was majority minority leaders, but we had our diversity champions and senior leadership. It was two days focused on growth, development, industry, and knowledge. Having that time and attention dedicated to our leaders really answers, and it's a tie back to what we hear around employee engagement, it was a tie back to really wanting to understand and be able to navigate ones career.

LuAnn Heinen:

That's great. Did you keep a video? I'd love to see that.

Allison Green Johnson:

All of our sessions were recorded. We're sharing them with the broader population.

LuAnn Heinen:

We talked about what played out on the national stage in 2020. On top of police violence toward black people and other people of color and mass protests around the country, then we had the pandemic, which obviously the stress and anxiety were at high levels for everyone and forced so many dramatic changes at every level: the individual or employee level, company, community, and national. Despite the trauma we all experienced and the forced adaptations, are there changes that you'd like to maintain going forward? Obviously, your action commitments are awesome, but what about in the way that we work? I know the crucial conversations is something that you're planning to continue. Any other effects of the last year or so that you want to pull forward?

Allison Green Johnson:

Absolutely. One thing we've seen across the board is leaders, managers, employees feeling empowered and communicating more, sharing more. We've heard through, what we instituted as we call it Feedback Fridays, which is a pulse survey or a touch point survey to stay engaged with employees. It's two quantitative questions and an open-ended question, and it's our way of asking for feedback around programs, asking for feedback around well-being, what do you want more of as we move forward. We've gotten so many learnings from that.

Early on we learned that employees were really appreciating the amount of communication that leaders were sharing and managers were sharing. We learned people needed different office equipment at home. We've heard from employees about their well-being and wanting to make sure they could get support for kids at home during the day and just being able to balance more of work-life integration and starting well-being programs to help with that. We have continued this ongoing listening through Feedback Fridays, and I have found that employees continue to share when they know they've been heard. We have a process with Feedback Fridays of getting the information right back out to employees, here's what we heard and here's our plan.

LuAnn Heinen:

You've had a good response rate, isn't that right? I mean, a pretty routinely high responses, as I recall.

Allison Green Johnson:

Yes, a routinely high response rate. I believe that is a direct result of continuing to ask, but yet sharing here's what we've heard and then seeing action around it. It's one thing just to ask and say, thank you. It's another to say, here's what we heard and here's what we're doing. We definitely want that to continue.

LuAnn Heinen:

Let me challenge you on that last point, because that's great. The *Wall Street Journal* not too long ago had a survey, they reported like 9 out of 10 workers said that they wanted to work from home after the pandemic subsides, at least once a week, maybe more. One in three said they wouldn't work for a company that forced them to be on-site full-time. What if you have a situation where you need people in the office and Feedback Friday is telling you we don't want to do that.

Allison Green Johnson:

Great question. Let me tell you, because we're part of that, right? What we've started based on this, early on last year we launched a project called Project Happy Place. Project Happy Places is a study around how we will return to work. Based on what we've heard, we have looked at our roles, our locations, job requirements, etcetera, and the big etcetera is what are our people saying? What would they like? We have options around return to work. There will be some employees that will return to the office when it's safe, full-time. There are folks that will have flex-hybrid roles and those flex-hybrid roles are work from home more days of the week and come into the office a couple of days, or come into the office more, and the ability to work from home, and some will become remote permanently. When we look at that shift, we found in being able to look at roles that way, employees have really embraced that. Even as we're recruiting new employees, having those options, we're now able to recruit and look at talent across the nation in ways that we haven't been able to before. We did hear this and this was one of the ways in which we've responded with the amount of flexibility. More employees than not will have that flexibility.

LuAnn Heinen:

That's terrific. You mentioned earlier employee well-being. What are your goals for well-being? Any new initiatives or anything that you're doing that's been strongly reinforced by the feedback?

Allison Green Johnson:

We've definitely seen an uptick in our employee assistance programs and we've extended that benefit. We also have started some wellness practices for employees on our own that are Lincoln sponsored. Our total rewards group has been very proactive around the offerings for that. We've thought about what does the day look like and where is it from an organizational perspective? We could say, okay, there's just some sacred time when you should not schedule meetings and just plan to either take a break from your computer, make sure you're taking care of yourself. We have instituted times during the day where there are no meetings, no calls, that's employees' time. On certain days you should feel free to block out time that you need to step away and/or take care of things that you need to take care of. It's a part of that emotional well-being. It's giving people more flexibility. We've instituted some leave time, extended leave time, and new leave policies that employees can take advantage of.

LuAnn Heinen:

Are the times without meetings sort of Eastern time-zoned, so it's noon Eastern or something, then across the country, it's that same hour, or how does that work?

Allison Green Johnson:

We say the lunch hour and the beauty of that is if your lunch hour is 12 to 1 Pacific time, then the folks on the East coast respect your lunchtime. We didn't designate a particular hour, but in that example, it's your lunch time.

LuAnn Heinen:

I know from past conversations that partnerships are a big part of your work at Lincoln Financial and the successes that you've had. Who are some of your strong external partners and what's made those partnerships work for you?

Allison Green Johnson:

If we think about from a diversity and inclusion or foundation perspective in the community, we just established a fantastic partnership with UNCF and that partnership will enable us to support students at historically black colleges or universities complete their education. It also enables us to leverage that talent or invite that talent to get to know Lincoln and hopefully want to work for Lincoln.

LuAnn Heinen:

Very smart. United Negro College Fund, that's an organization it's been around a long time.

Allison Green Johnson:

A very long time and a very well-respected organization. They do great work on behalf of, you've heard the saying a mind is a terrible thing to waste, and they've been doing that work since I was a kid. They've been a strong enabler, supporter of black scholars and introducing African-Americans to enabling them to obtain their degrees at historically black colleges and universities.

LuAnn Heinen:

Just a couple of kind of blue-sky questions. I'm wondering what will be different for the next generation of leaders in your position or will that position even be needed?

Allison Green Johnson:

There's two ways to go with that. Let's say the position remains a needed position in the organization. I think we've gotten to a great place where we can have more candid conversations about what the real issues are and whether those issues be around a particular population or practices in an organization that needs to be a bit more equitable, inclusive, and enable belonging. I think for the next generation, these will be more open conversations. I think we have broken a barrier in most places. In our organization we've broken a barrier where it is not taboo to say race. It's actually a conversation that can be introduced from a learning perspective.

LuAnn Heinen:

That is pretty huge.

Allison Green Johnson:

It is. The other path is for the next generation. Perhaps this role doesn't have to exist if the things that we're putting in place now continue, they're sustainable, and grow. When we talk about practices that promote equity, practices that enable the differences that we all bring to be leveraged appropriately so that people are included. When you look at the results that you've achieved, that it's because everyone at the table was included, maybe there won't be a need for this. When I started in this role, I considered it almost like a Secretary of State, the chief diplomat for the organization. I'm beginning to think about it different because

there are some topics where diplomacy may do more harm than good. There are times that you do have to bring the tough subject, the uncomfortable conversation to the forefront. If you think about being a diplomat, what I've come to understand if it is the chief diplomat, sometimes to get to the diplomacy, you've got to go through some things and some of that's education.

LuAnn Heinen:

What has given you personally, the greatest satisfaction or joy?

Allison Green Johnson:

Someone once told me, a person I look to and I consider them a beacon in the diversity space, said you've got to celebrate each win in each accomplishment, in and of itself. If you're waiting for the big, big, big change, you might spend a considerable amount of your career disappointed. When I look at it like that, I look at all the wins that we've had at Lincoln as wins that lead up to one big high point. I would say we're on a high now. When I think about my career, and I'll just take most recently instituting the eight actions, some of them that we didn't talk about that are very meaningful are around, we're establishing and growing a professional network of black financial advisors. Why this is so meaningful is when you think about the opportunity in this country for everyone to fulfill the vision that we have at Lincoln around securing your financial future, and sustaining and growing wealth, that needs to be open to all communities. As we think about diversity and with everything that we've seen around the black community, having that access to products and services more readily available. Expanding the diversity and inclusion functions so there are more people in the organization that can do more, can enable more, support more, and be out in our communities, in our marketplace, educating and leading. That's very exciting. The work of our foundation and the partnerships that we have internally around equity-based grantmaking. When I think about these eight actions, I think about how we're talking about race, how we're understanding historical issues around race, and how that impacts corporate America and corporate America's responsibility in this country to have an impact on the way in which our society works. All of these things are things that I'm very proud of and I feel like, given the dedication to this over my career, being a part of helping all of this become a reality is our high points.

LuAnn Heinen:

This integration of, you mentioned before, workplace, marketplace, and community all being important and it made me think of the many companies who are putting statements on their website and writing to their customers and shareholders about their commitments, even explicitly to Black Lives Matters, to equity, diversity and inclusion. Where do you think that's coming from?

Allison Green Johnson:

If we go back to a year ago and all of us, or the vast majority of people, actually seeing something happened that was horrific and thinking about it as it relates to people they know see communities that maybe they didn't think this kind of thing happened, and having that awakening that if we don't do something, who will. If we individually say that, if the communities that we live in and the places that we work say that, if not me, then who. I think people have answered, it should be me, and organizations are saying, okay, we can't stand for this and what does that look like in our organizations? We want to say something and do something.

LuAnn Heinen:

Thank you so much, Allison, for spending time with us on the podcast today. I learned a lot and really appreciate it.

Allison Green Johnson:

Thank you for the opportunity.

LuAnn Heinen:

I've been speaking with Allison Green Johnson about her team's efforts to shape and shift culture to deliver on business strategy and employee experience at Lincoln Financial. The company has been ranked by *Fortune* as a

Best Employer for Diversity for the last three years, and for the fourth consecutive year received a 100% score and the honor of Best Places to Work for Disability Inclusion, according to the Disability Equality Index.

I'm LuAnn Heinen and this podcast was produced by Business Group on Health with Connected Social Media. If you're listening on Apple Podcasts and like what you heard, please rate us and leave a review.