



## How Employee Recognition Helped Make AAG a “Top Workplace”



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Creating a balanced, engaging workplace culture has always been important to the leadership at American Advisors Group (AAG). The company has been recognized as a Top Workplace, receiving solid endorsements from employees in both its corporate offices and remote locations.



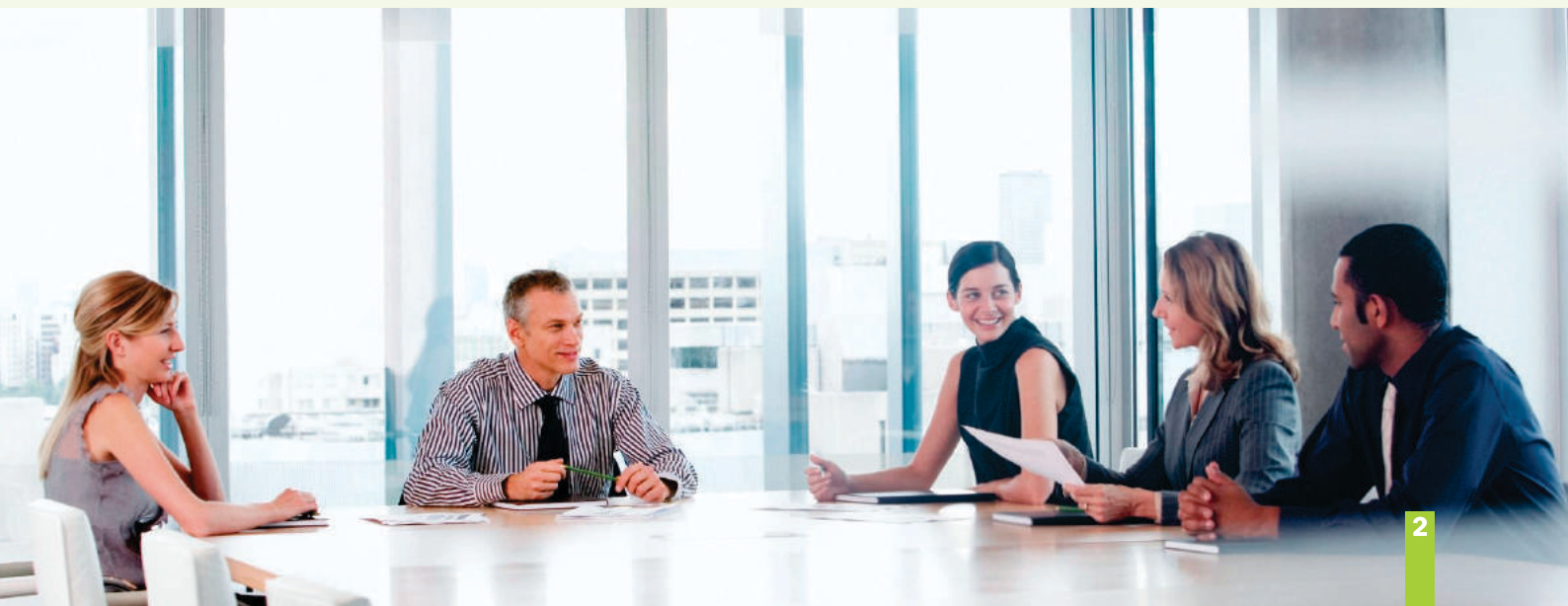
“We wanted a recognition program that could reinforce our core values, while giving employees the ability to personalize the messages and make them more meaningful to the recipient and the organization at large.”

– **Lauren Willis**  
Director of Corporate Engagement



AAG is dedicated to helping older Americans find new ways to fund a better retirement through the responsible use of home equity. The company is the nation's leading reverse mortgage lender, and prides itself in its caring and consultative approach towards seniors.

AAG also takes pride in their caring, driven and ethical culture, promoting a strong work-life balance and engaging its workforce to feel like one big family. Named to *Entrepreneur* magazine's Top Company Cultures List, and recognized by the Orange County Register as a Top Workplace every year since 2013, AAG maintains a positive workplace environment through their commitment to meaningful recognition and rewards.







# THE CHALLENGE

While guiding seniors through complex financial decisions is challenging, AAG employees feel rewarded by their work; they are making a difference. After all, they are helping older Americans access equity to pay bills and stay in their homes. But, as the company grew over the years, so did its turnover rates. Exit interviews revealed that the organization was losing its “family feel.” Employees were feeling lost and underappreciated in this larger organization.



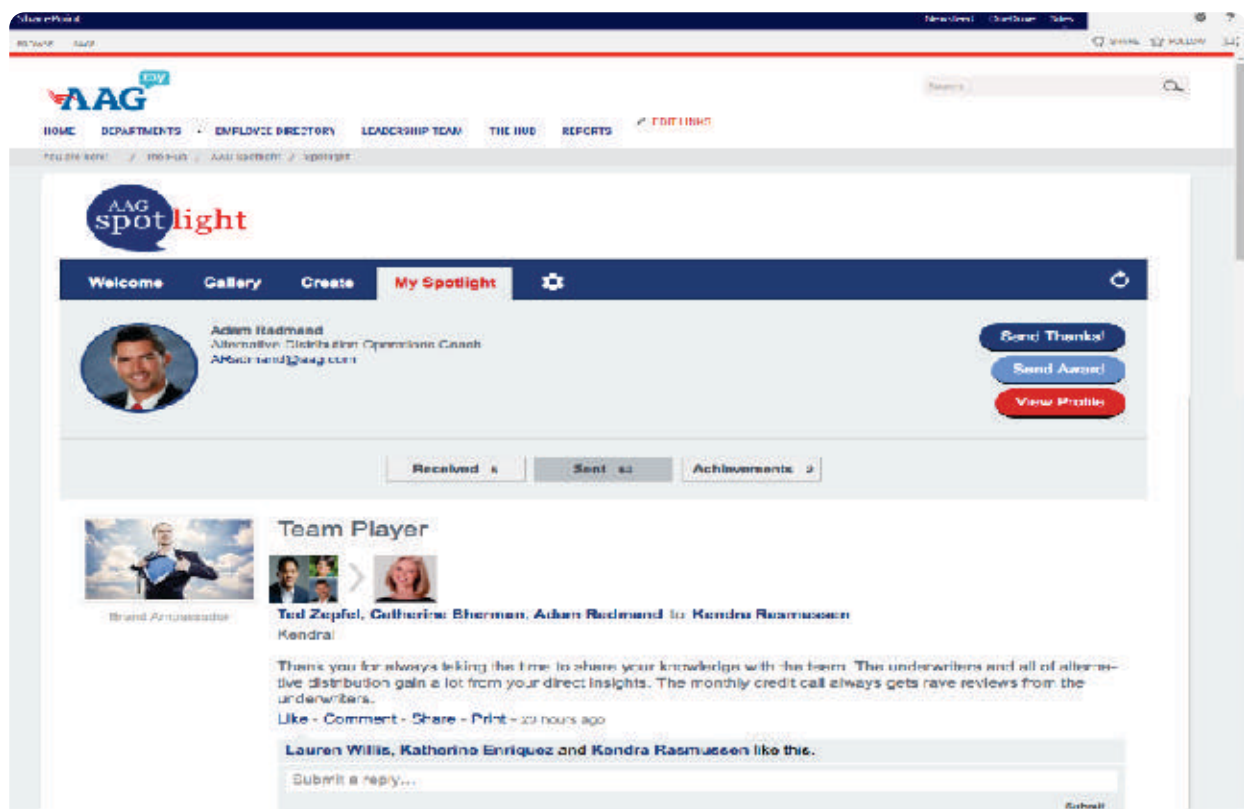
But, maintaining high employee engagement and a family atmosphere can be a challenge for any company; even more so when your 1,200 employees are spread across the U.S. in six different offices or working remotely. Clearly, for any recognition strategy to be effective, technology would have to be part of the solution. Although, it had to be a technology that emphasized and built upon the human side of the equation.

Initially, AAG ran a recognition program called the “Awesome Awards,” which was used by managers to recognize and reward the work of top performing employees. While employees liked the program, it was difficult to administer and, because the communications took place over email, it didn’t have the visibility that team members felt “Awesome Awards” deserved.

"We all agreed on the importance of recognition and that we needed to formalize our process," says Nicole Freerks, Communication Specialist. "Our initial program just didn't have the lift or the visibility to encourage participation."

In 2015, a group of 30 influential and charismatic employees launched an initiative called #ProjectInspire to see if they could take AAG's culture to the next level and put recognition front and center in every employee's mind.

AAG uses a number of software tools and systems for collaborative work, including Microsoft SharePoint which serves as the company's Intranet and the backbone for communications. Not only does SharePoint, branded "myAAG," help employees manage their personal workflows, it provides an all-in-one-place "dashboard" view of life at AAG. SharePoint is where team members can view the corporate calendar, catch up on industry news, link to Salesforce, and find links to training and important policy announcements. The "MyAAG" Intranet portal even gives employees a place to tap into company pride through AAG themed merchandise available in the company's SwAAG Store.







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– **Nicole Freerks**  
Communications Specialist



It was critical, therefore, that any corporate recognition solution would work alongside myAAG, within the Microsoft SharePoint environment. To ensure its success and demonstrate a ROI, it needed to reach both onsite and remote employees, and it had to raise the visibility of employee recognition across the board.



## American Advisors Group at a Glance



**CEO**  
**Reza Jahangiri**



**INDUSTRY:**  
**Financial Services**



**NUMBER OF EMPLOYEES:**  
**1,200**



**FOUNDED:**  
**2004**



**OFFICES:**  
**Six offices across  
the United States**



**EMPLOYEES WORKING  
REMOTELY:**  
**250**

# THE SOLUTION



"TemboSocial was able to integrate with our intranet and give us the newsfeed-style communication we were looking for. It also gives us the reporting that we need to guarantee the long-term success of the program."

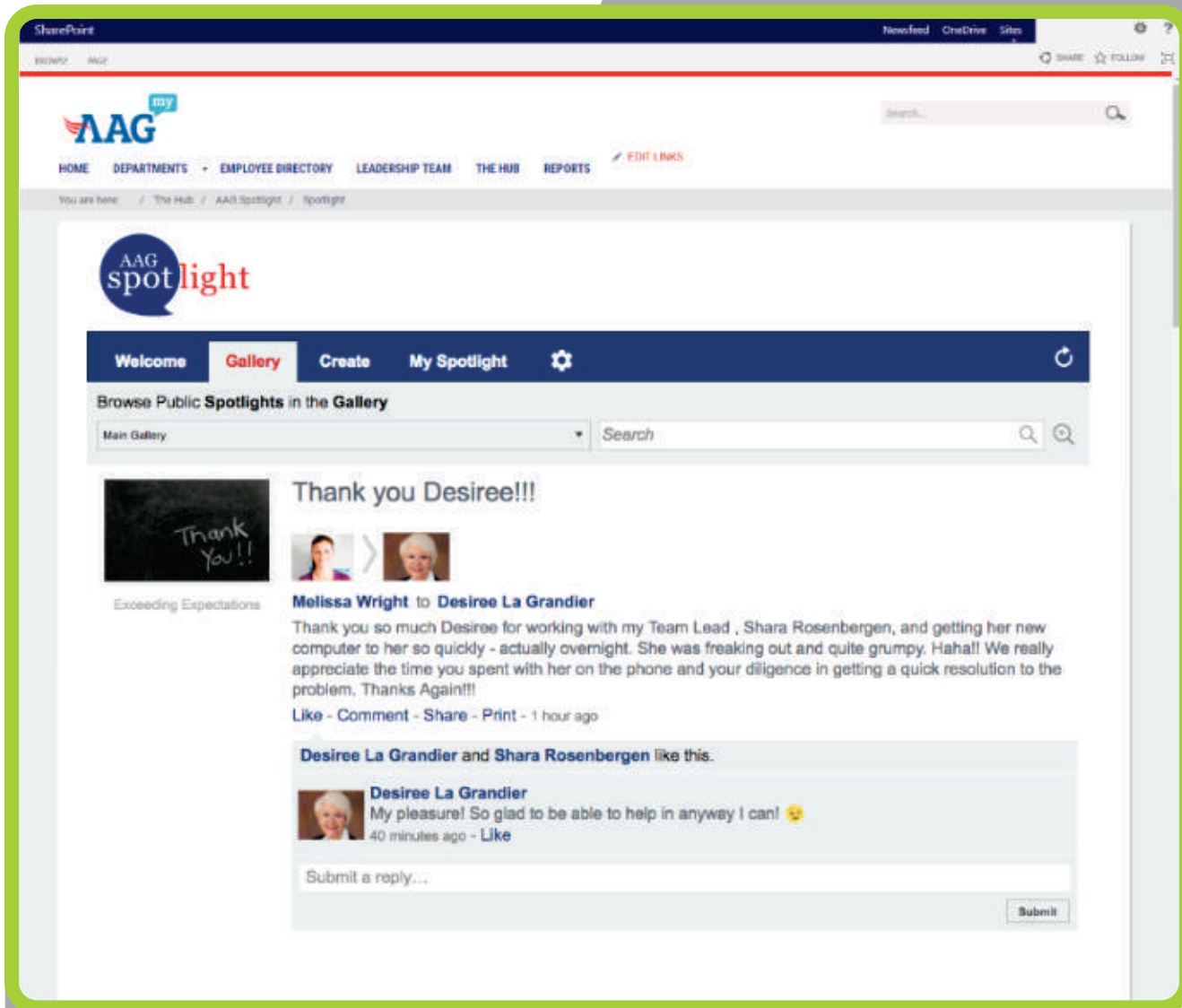
– **Lauren Willis**

Director of Corporate Engagement



After reviewing company requirements, the #ProjectInspire team decided on TemboSocial, a software solutions provider whose products propel connections, conversations, and community. With the main objective to drive greater visibility of employee recognition at AAG, TemboSocial's team of enablement specialists worked alongside AAG's IT team to quickly deploy a corporate-branded recognition portal under the in-house name of "AAG Spotlight."

One of the popular aspects of the new platform is that it brings a unified, highly visible recognition program to AAG. Employees love that they can build their reputation inside the company, collecting recognition from peers and leadership alike, that is then displayed within their personal social trophy case. This highly visual, user-friendly platform spans across AAG's various offices easily engaging onsite and remote employees.



### Some of the other strengths of the TemboSocial platform are:

- \* Full integration with AAG's existing digital workplace. This brings recognition front and center into every employee's newsfeed highlighting desired behaviors that drive business success.
- \* The Spotlight program and the MyAAG intranet work in synergy to increase employee's overall knowledge about their jobs and the company.
- \* TemboSocial is fully customizable, to reflect corporate branding and to reinforce core values. This makes AAG Spotlight a seamless part of the AAG experience.
- \* The AAG Spotlight recognition program was easy to deploy and is largely user-maintained, without putting a burden on IT staff.

# THE SOLUTION

When AAG deployed TemboSocial, they quickly saw a powerful change in the way recognition was managed within the company. Almost overnight, AAG went from having a top-down, leadership-driven recognition program to having a bottom-up peer-driven program.



"The peer-to-peer part of it is important to the way we structured our Spotlight awards. It used to be that nominations only came from management. Now the majority of our recommendations are coming from peers."

– **Nicole Freerks**  
Communications Specialist



The AAG Spotlight platform also empowered employees in unexpected ways. When AAG's CEO Reza Jahangiri was named Entrepreneur Of The Year® Award Winner in Orange County, individual employees were able to show their support and pride for Reza's win by sending him an AAG Spotlight; enabling employees of all levels to personally engage with their CEO and publicly recognize his accomplishments.

TemboSocial also helped give remote employees the same level of visibility as team members in the corporate office. Not only were remote workers enthusiastic adopters of the program, the seamless integration into AAG's existing active directory enabled the sender and receiver's photos to be included in their posts and their comments as they became an integral part of the general conversation.

One of the surprising results that came from adopting TemboSocial is that it moved recognition from quarterly/annual demonstrations, into the hands of employees, empowering teams to drive engagement more frequently on their own in real time.

"We have one employee who is constantly running activity reports because he wants to help drive the recognition in his department," says Lauren.

Finally, as the #ProjectInspire team had hoped, the AAG Spotlight program helped increase traffic to myAAG, the company's intranet. The recognition newsfeeds work alongside other tools creating fun, self-generating, and highly engaging content that employees value. By pairing their recognition program with a central communication channel, AAG employees are more knowledgeable, have a better idea of where to find tools and trainings and they are more closely connected with their peers.





# TemboSocial

**has helped connect remote employees by putting a face to a name.**



"When Frank from New York recognizes a mortgage processor in California, everyone can see it. It helps humanize the process because it's not just another name on a document or email. People are connecting on a more personal level and appreciating each other."



**– Lauren Willis**  
Director of Corporate Engagement



## THE NUMBERS

### A recognition program from the bottom-up

AAG went from a nomination-based recognition program, where “winners” were selected by management, to a many-to-many program where everybody has a voice. On average every AAG Spotlight announcement is shared among employees **1.9 times**. Not only is this a multiplier effect for recognition, but it also reflects the way work gets done in the modern workplace - through the contribution of a group.

### A recognition program that is visible

Because AAG Spotlight announcements are integrated into a feed on myAAG's homepage, employee recognition gets massive traffic within the organization. Since the program began, AAG Spotlights have been viewed nearly **350,000 times**.

### A recognition program that is a destination

AAG Spotlights get more than visibility on myAAG, they get action. The conversion factor is extremely high with AAG employees clicking through to the AAG Spotlight portal an average of **6 times each**. That's about **7,500 unique visits** to the AAG Spotlight site since the program began.