

CASE STUDY:

# Ullico x TDM LeaderView™



the diversity movement  
A Workplace Options Company

# EXECUTIVE SUMMARY



## CLIENT:

Ullico Inc. has provided insurance and investment solutions to support the needs of labor organizations, investors, and employees.



## CHALLENGE:

Despite having a diverse workforce, Ullico's previous DEI efforts with other consultants did not promote the progress management desired. Ullico sought an expert partner who could create a holistic DEI roadmap and sustainable approach for their leadership team and employees that included robust assessment, coaching, and training.



## SOLUTION:

[TDM LeaderView™](#)



## OUTCOMES:

- ▶ **Improved Communication to Build Inclusive Culture:** Leaders gained a deeper understanding of the importance of inclusive communication and language, fostering a more mindful and inclusive atmosphere needed to deliver business results.
- ▶ **Personal Development:** Self-reflection exercises helped leaders make better decisions and improve relationships with their teams by surfacing potential biases.
- ▶ **Actionable Commitment to DEI:** Leaders appreciated the safe and supportive environment created by TDM, which allowed them to openly address challenges and commit to ongoing DEI learning and improvement.
- ▶ **Investment in Talent:** A mentorship program and stronger emphasis on sponsorship and succession planning are among the ideas under consideration to nurture and develop internal talent.

## What Ullico says:



*What stuck out to us the most with TDM was [understanding] the business imperative. They had a lot of data around the fact that [DEI] makes good business sense. When you have people from diverse backgrounds sharing diverse perspectives, you can make better decisions, and that ultimately yields better results. So TDM's approach is what really resonated with us.*



– Tracy Coker,  
Vice President,  
Human Resources



## INTRODUCTION

Ullico Inc. has a rich history that spans over 95 years, founded with a mission to provide financial security for union members who were often denied life insurance due to their high-risk jobs or union affiliations. This commitment to supporting underrepresented groups has been a cornerstone of Ullico's ethos since its inception.

Operating within a traditionally male-dominated industry, today Ullico boasts a diverse workforce with 51% of employees being women and 49% men. Additionally, nearly 50% of Ullico's workforce comprises people of color. At the leadership level, 32% of the officers (AVP and above) are women, and 24% are people of color.

Despite these statistics, Ullico identified the need for a more structured DEI framework to ensure ongoing progress and support for all employees. Tracy Coker, Vice President, Human Resources emphasized the importance of making DEI a corporate endeavor, stating, *“I didn't want it to just be an HR initiative. I knew it had to be a corporate initiative.”*

## THE CHALLENGE:

### Previous DEI Efforts and Need for Change

Ullico had always prided itself on fostering an inclusive environment, but previous DEI efforts with other consultants had not yielded the desired results. These attempts often left employees feeling conflicted, particularly because some felt that past trainings were more accusatory than constructive. For example, previous sessions made some employees feel singled out and uncomfortable as they perceived the training as calling out their privilege rather than fostering a productive conversation. Tracy recognized that to truly embed DEI into the fabric of Ullico, it needed to be embraced at all levels of the organization, with a focus on framing DEI in a way that resonates with all employees and ties directly to the company's business goals. Ullico aimed to strengthen inclusive leadership and embed DEI into their business practices.

## Seeking External Expertise

In 2023, Ullico decided to seek external expertise. Ullico initiated an RFP process to find the right partner. They reviewed proposals from three different companies, each presenting their approach to fostering an inclusive workplace. The Diversity Movement (TDM) stood out with their unique business-focused approach.

Tracy explained, *“What stuck out to us the most with TDM was the business imperative. They had a lot of data around the fact that it makes good business sense. When you have people from diverse backgrounds sharing diverse perspectives, you can make better decisions, and that ultimately yields better results. So, TDM’s approach is what really resonated with us.”* With TDM’s guidance, Ullico was poised to embark on a transformative journey.

## TDM’S SOLUTION:

### TDM LeaderView™

[TDM LeaderView™](#) was a cornerstone of TDM’s engagement with Ullico. The process began with comprehensive assessments, including LeaderView self and peer review assessments, completed by Ullico’s leaders. These assessments provided valuable insights into each leader’s strengths and areas for development, setting the foundation for the personalized approach that followed.

Leaders then participated in one-on-one coaching sessions to review the assessment results. These sessions allowed for personalized feedback, enabling TDM to tailor the upcoming in-person training to address specific needs and concerns.

The final phase of LeaderView was the in-person training session, designed to be comprehensive and interactive. TDM focused on digging deep into the definitions of diversity, equity, and inclusion, emphasizing that DEI is not just about visible differences like race and gender, but also about non-visible aspects such as background, culture, and beliefs. The training provided leaders with tools and strategies to improve their inclusive leadership skills by addressing unconscious biases and using inclusive language within their teams.

## Organizational Assessment and Strategy

While leaders were engaged in LeaderView, TDM also conducted a thorough assessment of Ullico’s current DEI landscape, which included distributing [surveys](#) and conducting [listening sessions](#). The high level of employee participation, with 76 percent completing the surveys and many contributing to the listening sessions, demonstrated strong engagement and a genuine interest in DEI initiatives.

The findings from this assessment will be crucial in developing a comprehensive [Action Plan](#), which will guide Ullico's long-term DEI strategy, ensuring that the company's initiatives are data-driven and effectively address the needs of their diverse workforce. Tracy emphasized, *"We need to use the data to inform our strategy and make decisions based on what our employees are telling us."*

## OUTCOMES:

TDM's approach was comprehensive, combining top-down and bottom-up strategies. Leaders are empowered to drive change from the top, while employees at all levels are engaged in the process, creating a cohesive and inclusive culture across the organization. One of the tangible outcomes of this approach was the ability to create stronger, more compelling responses to bids for new business by clearly demonstrating Ullico's commitment to inclusion.

### Initial Outcomes

Within two to three months of the engagement, the initial outcome is already evident. Tracy noted, *"Leaders are now more mindful of their language and how it impacts others. There's a conscious effort to avoid terms that may exclude or offend, which is creating a more inclusive atmosphere within their teams."* Additionally, team-building activities are being valued more highly, further strengthening the sense of belonging among employees.

## Key Learning Moments

One of the standout aspects of TDM LeaderView™ training was connecting DEI to business impact through key learning moments. The training offered a clear definition of DEI that transcended political connotations. Tracy shared, *"I heard a lot of positive feedback from the training. Leaders said they really liked how TDM broke down diversity, equity, and inclusion in terms of definitions. Understanding what DEI is and what it isn't was really helpful."* This clarity was particularly significant given the current climate where DEI is often misunderstood and misrepresented.

The circle of influence exercise emerged as a powerful tool for self-reflection, helping leaders to identify and understand their personal biases without feeling judged. Tracy highlighted that the training encouraged a level of vulnerability and openness and provided actionable strategies that previous efforts had lacked. There is a keen interest among leaders to further explore DEI topics, indicating a commitment to ongoing learning and improvement.



## CONCLUSION:

TDM's business-focused methodology was crucial for Ullico's successful engagement. With TDM's continued support, Ullico is well on its way to embedding DEI principles into its primary business objectives. Their commitment to developing action steps for concrete DEI activities, combined with the initial impact of the LeaderView training on both an individual and team level, sets the stage for a more inclusive and dynamic future. Ullico's proactive stance and dedication to DEI initiatives demonstrate their leadership in the insurance and investment sector, paving the way for lasting and meaningful change.



## Call to Action

The partnership between TDM and Ullico has shown how effective and transformative a comprehensive DEI strategy can be. If your organization is ready to embark on a similar journey towards DEI excellence, consider partnering with The Diversity Movement. TDM LeaderView™ provides significant insights and actionable strategies that enhance leadership team effectiveness, boost overall team productivity, improve collaboration, and increase retention.

**[Reach out to us today](#) to learn more about how TDM LeaderView™ and other TDM solutions can help you create a more engaged workforce and innovative future.**