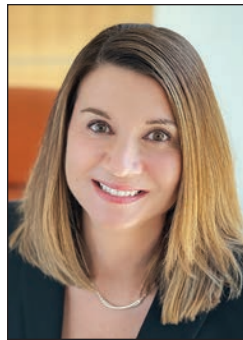


## Service-Based

An Interview with Melissa Jones, Executive Vice President and Chief Human Resources Officer, CSAA Insurance Group

**EDITORS' NOTE** *Melissa Jones leads CSAA Insurance Group's efforts in corporate culture; employee and CEO communications; enterprise program management; charitable programs; talent management and leadership development; employee benefits, such as wellness, recognition and pension programs; and diversity and inclusion. Under her leadership, the company has achieved a perfect score in the Human Rights Campaign's corporate equality index for LGBTQ*



*Melissa Jones*

*workplace equality. She co-founded the company's Women's Professional Network and is also the executive sponsor of the Black Employees Association. Jones has been recognized with the Industry Leader Award from the Professional Business Women of California, and also sits on the board of the Food Bank of Contra Costa and Solano County. She received a bachelor's degree in social sciences from California Polytechnic State University and an MBA from Brandman University.*

**COMPANY BRIEF** *CSAA Insurance Group (csaa-insurance.aaa.com), a AAA insurer, offers automobile, homeowners and other personal lines of insurance to AAA Members through AAA clubs in 23 states and the District of Columbia. Founded in 1914, it has been rated "A" or better by A.M. Best for more than 90 years and is one of the top personal lines property casualty insurance groups in the United States, according to the National Association of Insurance Commissioners. Headquartered in Walnut Creek, California, the company has more than 3,500 employees with offices in Arizona, California, Colorado, Nevada, New Jersey and Oklahoma.*

### Will you provide an overview of your role and areas of focus?

As the Chief Human Resources Officer for CSAA Insurance Group, a AAA insurer, I lead the company's efforts in people programs, including corporate culture, talent acquisition and management, leadership development, total rewards, employee communications, enterprise change management, charitable programs, and inclusion and belonging. I'm the co-executive sponsor of CSAA's Black Employees Association, and I also co-founded our Women's Professional Network, which was created to

empower women to take risks, use their voice and make an impact in the workplace and in the community.

### How important is it for the HR function to be engaged in business strategy?

A company's business strategy is only as effective as the people driving it. I'm charged with taking care of the best interests of our employees and the company. Creating line of sight for employees in how what they do drives and supports the company strategy provides meaning to their

work. An unhappy workforce will create unhappy customers, bottom line, and that will impact company productivity, profitability, and the health and well-being of your employees. Retaining talent has always been critical, but even more so as the pandemic changed workers' expectations. Today, flexibility is the number one question and request we get from prospective employees. Hybrid work and flexibility are here to stay, and you have to offer it if you want to compete for the best talent. Adapting your culture to support a virtual work experience – things like enhancing digital platforms, more intention in creating connections, revamping people programs – are all extremely important

to be prepared for the workforce needs of the present and the future, and to delivering on the company's long-term business goals.

### How do you describe CSAA's culture and values?

We have a really strong service-based culture that focuses heavily on inclusion and belonging, development, community, and volunteerism. We have a set of core beliefs that are the foundation of our culture, and core to who we are and how we do our work: unwavering integrity, personal and mutual accountability, the power of inclusion, a passion for service excellence, thinking big and moving fast, and investing in ourselves.

We foster an inclusive community that values connection, creation and collaboration, regardless of where we physically work. The pandemic forced us to evolve our collective view about the viability of a more dispersed workforce. Today we lead with employee choice, and, as of this writing, a vast majority of our employees, approximately 84 percent, have chosen to work from home full-time.

CSAA Insurance Group embraces a hybrid work model to provide flexibility in how and where employees work. We support employees in doing their best work every day and in bringing their full selves to each interaction. The

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**“The diversity of experience, thought and talent at CSAA Insurance Group is the result of a strong culture and our approach to find the best candidates, wherever they may be. I believe a career path here is not defined by where you live, but by the skills you bring and your willingness to grow and contribute to the success of our company and each other.”**

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**Will you elaborate on your views about the office of the future and how CSAA is handling a largely remote workforce?**

We have a company initiative that we call Future of Work, focused on what employee engagements will look like moving forward. Our goal is to enable and optimize a fully integrated, high-performing workforce comprising office, home and field-based workers. That's a big statement that requires a lot of work and planning, and we can expect how and where we do work to continue to evolve over time. It might not look exactly the same for all of us and we're gleaning insights and refining as we go, comfortable with not knowing all the answers right away. As we continue to experiment with a hybrid workforce, we are very candid with our employees about what we are doing and why. This includes evaluating and implementing new software platforms that are focused on employee engagement.

**CSAA places a major focus on employee wellness. Will you discuss CSAA's four pillars focused on Financial, Mental, Physical, and Social well-being?**

Our award-winning Living Healthy at AAA well-being program is built around those Four Pillars of Well-Being. CSAA employees can access a wide variety of health and well-being support to encourage healthy behaviors, such as completing preventive care, biometrics and vaccines, using virtual visits, setting healthy goals and more. Programs that support the financial health of employees include a 401(k) match of up to 6 percent of eligible pay; a profit-sharing plan; 1:1 sessions with retirement counselors;

company-paid life and disability insurance programs; and student loan repayment, scholarship and tuition reimbursement programs.

Mental well-being is a focus for CSAA. This year, we're introducing a new employee resource group (ERG) focused on mental health, and we're continuing our partnership with One Mind at Work, a global employer-led coalition that works to improve mental health in the workplace. Mental well-being goes hand-in-hand with social well-being, which is the ability to communicate, develop meaningful relationships with others, and maintain a support network that helps you overcome loneliness, which is very important in the wake of the pandemic and more people working from home. In addition to our new ERG focused on mental health, we offer a wide variety of other ERGs that bring together employees based on ethnicity, religion, gender and sexual identity, life experiences and other criteria. These ERGs, each of which has an executive sponsor, support our diversity by helping to ensure we are an inclusive organization meeting the needs of our employees and customers, identifying areas for improvement, and celebrating the differences among us.

**How critical is it for CSAA to build a diverse and inclusive workforce?**

We believe it's our differences, visible and invisible, that make every individual at CSAA Insurance Group strong and unique. We believe that diversity and fostering an inclusive workforce are critical to maintaining a competitive advantage in today's marketplace. It enriches our environment, leads to improved leadership effectiveness, a more fulfilling employee experience, and greater customer satisfaction and performance. The ways in which we recruit for talent, serve AAA Members, and support local suppliers all reflect our commitment to diversity. Employees can join employee resource groups that help empower our workforce, serve AAA Members, and support business goals.

**Do you feel that there are strong opportunities for women to grow and lead in the industry?**

As I mentioned earlier, I co-founded CSAA's Women's Professional Network, which was created to empower women to take risks, use their voice and make an impact in the workplace and in the community. The insurance industry has a wide variety of benefits, inclusion programs, leadership development, wellness initiatives, community outreach and more that we can all be proud of, and there's great opportunity for women. We must continue to spread the word to encourage prospective employees to join us.

Specifically for CSAA, we have made great strides the past few years for female representation in our leadership ranks. Female representation is less than a percentage point below the U.S. Labor Market at the supervisor, manager, and executive ranks combined. We continue to be committed to devoting the resources and effort to improve representation of not only women, but people of color, in our leadership ranks.

**What do you see as the responsibility that leading companies have to being engaged in the communities they serve and to be a force for good in society?**

Giving back to the communities we live and work in and to the customers we serve is something we're committed to, passionate about, and is part of our DNA. Our commitment to volunteerism is an integral part of what makes us a good corporate citizen and a great place to work.

It's also important to note that given the role we play as an insurer in helping policyholders who experience losses due to climate-related changes, we have an individual and collective responsibility to reduce our climate-related risks. Our employees, our customers and the communities we serve are being impacted as they experience more severe weather and the increased severity and frequency of wildfires. We believe it's important to share our progress across these priorities and reinforce our vision for a better future. We want to lead by example and respond to the climate crisis with a sense of urgency.

**What do you tell young people about the type of career that the insurance industry offers?**

As our CEO, Tom Troy, is fond of saying: Insurance is a noble profession. We are making a promise to our customers to be there when they need us. We exist not just to provide financial protection to society, businesses and individuals, but to set an example of care and accountability within our communities. We need to do a better job in telling our stories to promote the exciting things we're doing and showcase the wide variety of careers – innovation, technology, data/analytics, actuarial – in the insurance industry. We also need to tell our stories of serving and helping local communities. At CSAA, our enduring purpose centers around helping our customers prevent, prepare for, and recover from life's uncertainties. We challenge ourselves to find innovative ways to serve members and communities with care and compassion. ●