



# Training for Home Office Employees

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# What are the **Personnel** **Qualities** Required for Home Office Employees?



# Qualities Required for Home Office Employees of Prudential of Japan①

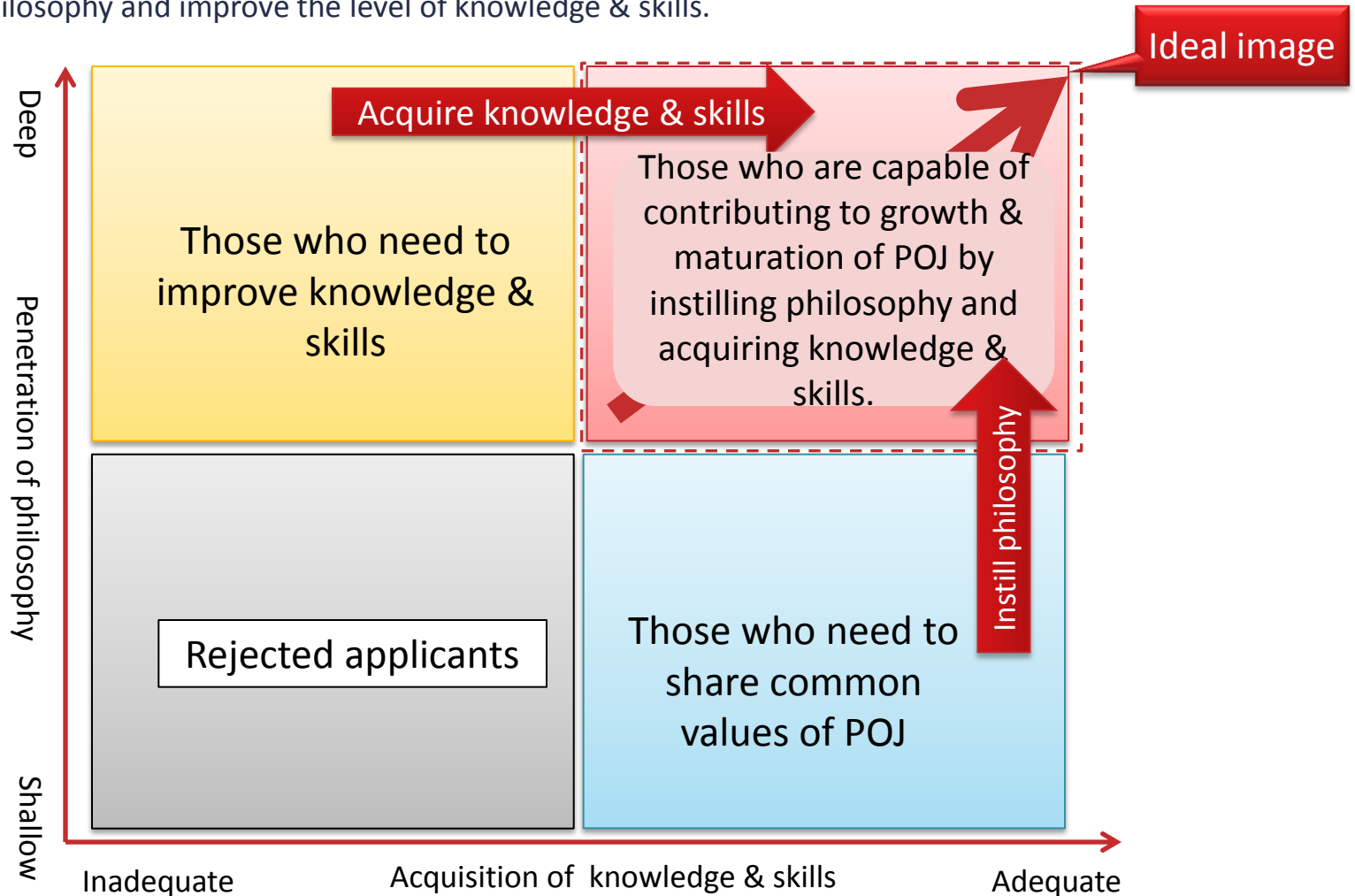
The behavior, knowledge, and skills below are required before the requirements as employee of POJ.





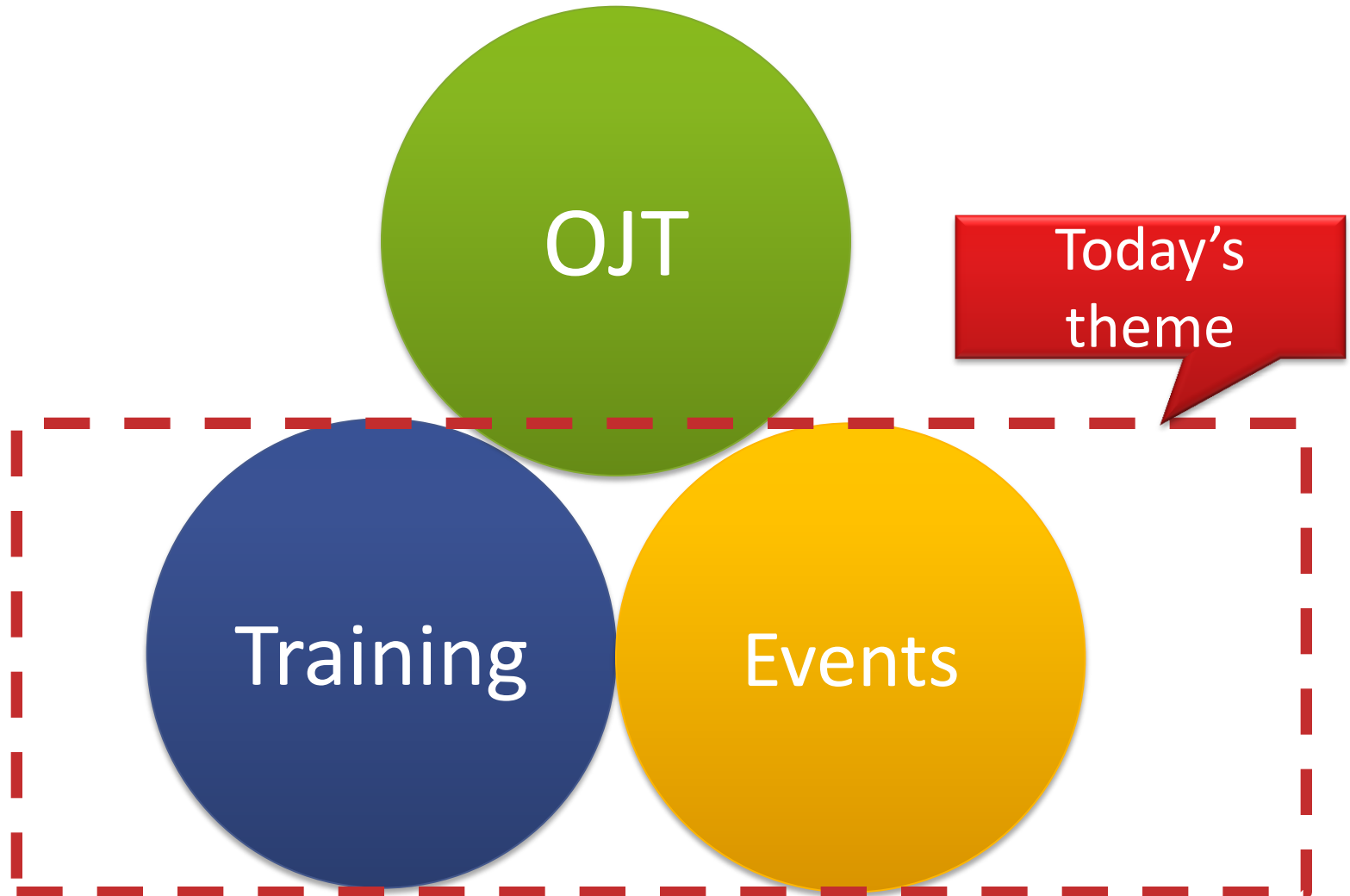
# Qualities Required for Home Office Employees of Prudential of Japan②

To help all employees get into the top-right category, and constantly make improvements, we will instill corporate philosophy and improve the level of knowledge & skills.





# Human Resource Development for Home Office Employees



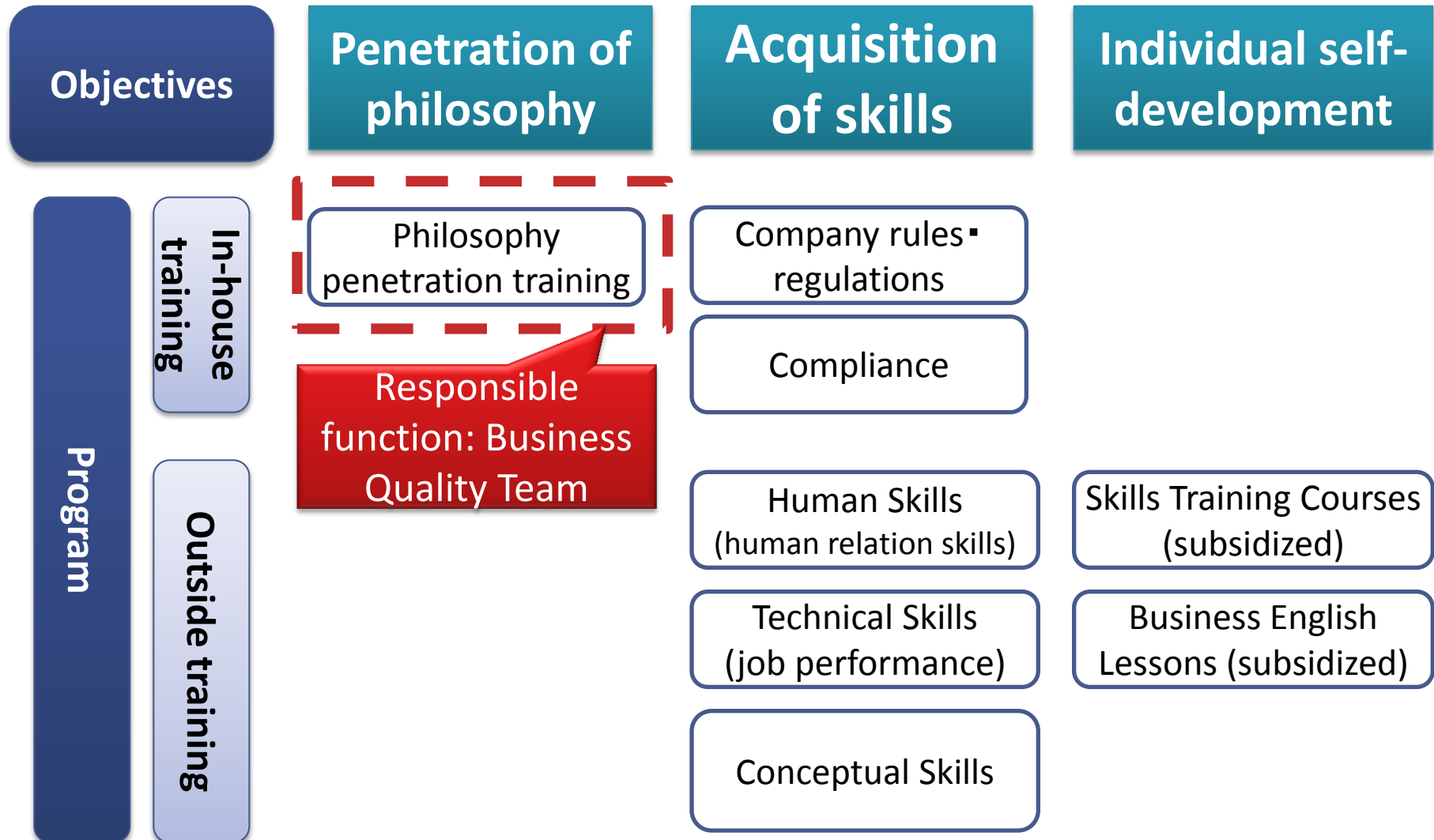


# Training for Home Office Employees





# Diagram of Training System for Home Office Employees





# **The Reason Why We Started Training Program Aimed at Philosophy Penetration**





# Corporate Philosophy of Prudential of Japan①

Employees of Prudential Life are united with bond of strong will to contribute to society through life insurance business.

We have a pioneer spirit, conviction to pursue the right role of life insurance, and willingness to convey the enduring principle of human love & family love.

Guided by the Core Values, Vision, Mission, and Strategy, we will continue to initiate a new era for ourselves.



# Corporate Philosophy of Prudential of Japan②

## Core Values

- Worthy of Trust
- Customer Focused
- Respect for Each Other
- Winning

## Vision

We strive to revolutionize the way life insurance business is conducted in Japan, and become the most admired life insurance partner to the customers.

## Mission

Our mission is to provide the highest quality service and to deliver financial security and peace of mind to each and every customer.

## Strategy

We foster Life Planners, true professionals of life insurance, to conduct need-based sales to each customer, and offer personalized services for the entire lifetime of customers until we deliver insurance claims.



# Keywords Representing the Corporate Philosophy

Human love & Family  
love

Prudential's vision stated by John F. Dryden,  
founder of Prudential Life Insurance Company of  
America

Strive to revolutionize the  
way life insurance business  
is conducted in Japan

- Quality People
- Quality Product
- Quality Service

Financial security  
& Peace of mind

- Commitment to death benefit
- Ensure adequate coverage through  
need-based sales

Life Planner  
Need-Based Sales

Cornerstone of operation of Prudential of  
Japan



# Reason Why the Core Values were Adopted

Announced in November 1991.

Prudential, established as a mutual insurance company, had grown into a huge **diversified financial institution**, where companies and employees of **many different cultures** were integrated into one Group.



Core Values were made up based on renewed awareness of the importance for Prudential employees to share common values.



# Background to the Start of Philosophy Penetration Training

1991 Nov.: Announced Core Values for all employees of the Prudential Group.

1992 Mar.: Set up Japan's own project for putting the Core Values into practice.

2002 Jan.: Drew up the corporate philosophy of Prudential of Japan.

2002 Jan.: Kiyofumi Sakaguchi, founder of Prudential of Japan died.



**After the death of Mr. Sakaguchi, the founder of POJ, opportunities to discuss the “enthusiasm at the birth of the business” and “corporate philosophy” gradually decreased.**



# Start of the Home Office Basic Training (=philosophy penetration training) Program

## Background

- After the death of the founder, we are no longer able to learn firsthand of the enthusiasm at the birth of the business, history, and corporate philosophy.
- More and more mid-career employees join the company (=increase of employees who do not personally know the founder.)
- No place where all employees can share essential knowledge, enthusiasm, and commitment as POJ's employees.
- ⇒ **2009 July Started the philosophy penetration training for Home Office employees.**

## Program contents

- ① Deepen understanding of Corporate philosophy and Core Values
- ② Deepen understanding of Life Planner System(=Business Model)
- ③ Improve professional awareness and competency as an employee of life insurance company



# Program of the Training in July 2009

	7/13 MON	7/14 TUE	7/15 WED	7/16 THU	7/17 FRI
9:00	Orientation for the training EO Ohta	Orientation for the training EO Ohta	Orientation for the training EO Ohta		Orientation for the training EO Ohta (09:00-09:50)
10:00	Welcome to POJ President Sanmori (09:30-11:30)	What We Can Learn from Beck's 10 About LPs President Sanmori (09:30-11:30)	About the Core Values CMO Okawa, Gibraltar Life (09:30-12:00) ※12 participants from PFJ	Study visit to Agency Shutoken 4 Agency	Basic Concept of the HO HR System HR Team TL Miyahara (10:00-11:00)
11:00		<Magic of Life Insurance>		LP & Mechanism to Support the LP System Shutoken 4 Agency AM Kawamura (11:00-12:00)	Compliance SVP& EO Terada (11:10-12:00)
12:00	Lunch Break (11:30-13:00)	Learning Center Tour	<Video of Core Values (2002) >		
		Lunch Break (12:00-13:00)	Lunch Break (12:00-13:00)		Lunch Break (12:00-13:00)
13:00			<PT Speech : AM Kawamura>	Travel + Lunch Break (12:00-13:00)	
14:00	Life insurance market in Japan EO Ohta 13:00-14:45	Prudential Group in Japan EO Ohta (13:00-14:00)	Life insurance and social contribution RCMO Ichitani (13:00-14:50)		【Hot topics③】 Penetration of corporate philosophy Office of chairman, Yamashita-san (13:00-14:30)
15:00		【Hot topics ①】 About PFJ PFJ President Matsuzawa (14:00-15:00)		Office Tour Ichibancho ⇒ Pru Tower HR (14:00-16:00)	Wrap-up& Review EO Ohta (14:45-16:00)
16:00	Significance of Life Insurance Chairman Maeda (15:00-18:00)	Review & Break (15:00-15:30)	Prudential Dictionary SVP & EO Ano (15:00-17:00)		
17:00		Speech by Executive LP Shutoken 1 Agency SAIGA Motoharu Exe. LP (15:30-17:30)		Review EO Ohta (16:00-17:30)	Declaration of Resolution (16:00-17:30)
18:00		Get-together Evening ~ With Exe. LP Saiga ~ (From 18:15 in Jiyugaoka area)	【Hot topics②】 Diversity and Inclusion EO Fukazawa (17:10-18:00)		



## Challenges identified after the training programs from 2009-2013

- ① With the **input-based training** program, the trainees had shallow understanding.
- ② The 5-day program included many **redundant contents**.
- ③ Sending a Team member to 5-day program was **a large burden on the Team**.





# Shift to POJ Rock Training (=philosophy penetration training)

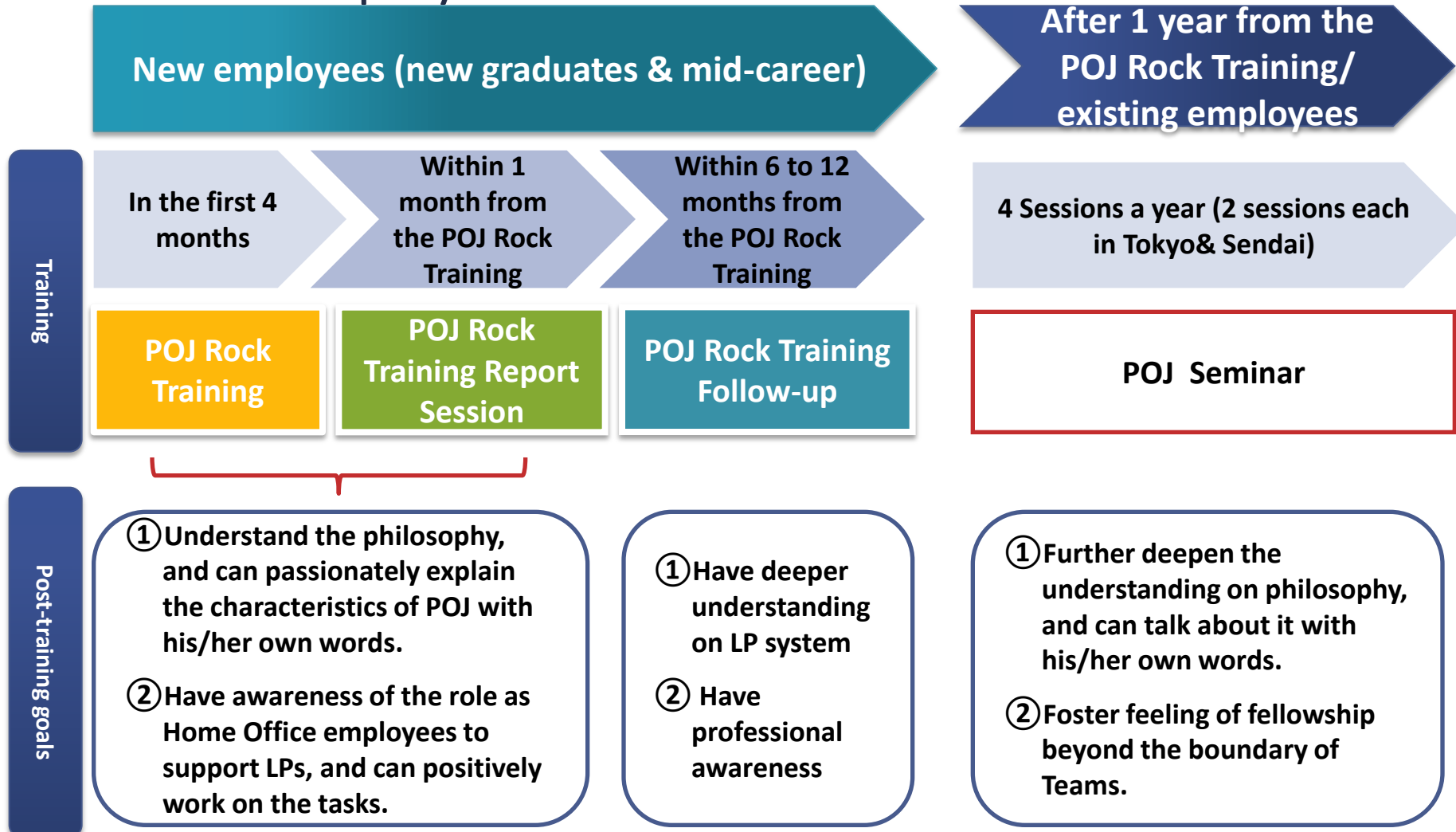
In 2014, Home Office Basic Training was reviewed and modified to POJ Rock Training.

## Key changes

- ① Changed the course to output-based program⇒Develop employees who not only **understand** but can **talk about** Prudential.
- ② For longer-lasting effect of the training, Training Report Session will be conducted.
- ③ Modified from 5 days⇒2.5 days  
⇒Reduced burden on the Teams



# Steps of Philosophy Penetration Training for Home Office Employees





# Program of the Training in July 2014

	7/24 THU		7/25 FRI		7/26 SAT	
Venue	TKP Garden City Nagatacho Conference Room 2B	Details of the Lecture	TKP Garden City Nagatacho Conference Room 2B	Details of the Lecture	TKP Garden City Nagatacho Conference Room 2B	Details of the Lecture
			Orientation (8:45-9:00)		Orientation (8:45-9:00)	
9:00	(Travel to the venue)		Financial security & Peace of mind  EVP& EO Akimoto (9:00-10:45)	<ul style="list-style-type: none"> <li>Comprehension check test (Questions taken out of the "Necessity of Life Insurance" in Blue Book)</li> <li>Needs for life insurance</li> <li>Importance of existence of POJ/LP</li> <li>Need-based Sales</li> <li>DVD "Message from Kimura-sama"</li> </ul>	Group Discussion Presentation  EO Fukazawa (9:00-10:45)	<ul style="list-style-type: none"> <li>Topic: "Pretend you are LPs, and explain about POJ in 3 minutes to a president (prospect) under time pressure"</li> <li>※Decide on the winning team.</li> </ul>
9:15						
9:30						
9:45						
10:00	Start from 10:30-	<ul style="list-style-type: none"> <li>Self-introduction</li> <li>Introduction of mission and its concept of trainee's own Team</li> </ul>	Break (10:45-11:00)	Extra time for catch-up on the schedule.	Break (10:45-11:00)	Extra time for catch-up on the schedule.
10:15						
10:30						
10:45						
11:00	Orientation/ Self-introductions (10:30-12:30)		Group Work/ Discussion  (11:00-12:15)	<ul style="list-style-type: none"> <li>Task: Comparing strength/weakness of each sales channel</li> <li>Topic (The World Café method): Role expected for LPs viewed from Japan's life insurance industry</li> </ul>	Review /Fill in the questionnaire (11:00-11:30)	<ul style="list-style-type: none"> <li>Review</li> <li>Fill in the questionnaire</li> </ul>
11:15						
11:30						
11:45						
12:00	Lunch Break (12:30-13:30)		Lunch Break (12:15-13:15)	View video of speech at PT	Declaration of "My PMA"  (11:30-13:00)	<ul style="list-style-type: none"> <li>Topic: "What do you put into action from tomorrow as an office employee working at POJ?"</li> </ul>
12:15						
12:30						
12:45						
13:00			Report: Life insurance purchase status(-13:30)	Status of life insurance purchase by family structure	End Course. Dismiss.	
13:15						



	7/24 THU	7/25 FRI	7/26 SAT
13:30	Role of and Expectations for Office Employees	Group Discussion	
13:45	President Ichitani		Topic (using Empathy Map): Do single men need life insurance?
14:00	(13:30-14:30)	(13:30-14:30)	
14:15	Break (14:30-14:45)	Break (14:30-14:45)	Extra time for catch-up on the schedule.
14:30	We are the Prudential	Need-based Sales by LPs	
14:45		Shutoken 10 Agency	Role Play Demo (for single persons)
15:00	Ano EVP	Komoriya LP	Q&A
15:15	(14:45-15:45)	(14:45-15:45)	
15:30		Share impressions on Role Play Demo (15:45-16:15)	Compare discussion results and Role Play Demo, and share impressions.
15:45	Break (15:45-16:00)	Break (16:15-16:30)	Extra time for catch-up on the schedule.
16:00	Group Discussion	POJ's Social Contribution	Exchange opinions in the first 10 minutes.
16:15		EO Takahashi	Topic: Why POJ needs social contribution?
16:30	(16:00-17:30)	(16:30-17:45)	Human love, Family love
16:45			Importance of CSR mind
17:00	Break (17:30-17:45)		POJ's CSR activities
17:15	Fill in the Core Values Goal Setting sheet/presentation	Break (17:45-18:00)	Extra time for catch-up on the schedule.
17:30	(17:45-18:30)	Review of Today/ Q&A (18:00-18:30)	Review the day with the Team, share questions. Q&A session.
17:45	Review of Today/ Q&A		
18:00	(18:30-19:00)		
18:15			
18:30	(Move to the social meeting venue)		
18:45	Get-together Meeting (19:30)		
19:00			
19:30			



## Future Challenges

- ① Takeaways from POJ Rock Training and passion to “transform the industry” fade after the trainees return to the Team.
- ② In day-to-day work and with only few opportunity to reflect on corporate philosophy, trainees gradually become less aware of the philosophy (benefit of the training cannot be sustained.)



**We plan to provide training for managers.**

**“Transfer of Passion”**



# Our Events





# Outline of Events

**To understand& embody  
corporate philosophy**

**CSR Activities**

**Core Values Recognition**

**To understand& embody  
business model**

**Awareness Month  
Events**

**Practical Sales Training**

**PTC  
(Participation as staff)**





# Introduction of CSR Activities

Home Office employees have little face-to-face contacts with customers. By promoting social contribution activities, we offer opportunities to embody the philosophy.



Marrow bank PR activities



Forest conservation activities



Office neighborhood cleanup



Reconstruction Marche to provide support for affected areas



Support for wheelchair tennis





# Message to All of You





# To continue the steady growth...

We need to pass on our philosophy & Core Values.

Acquire knowledge & skills



In  
demand

Penetrate philosophy



**Foster manpower to contribute to the growth!**