



# CASE STUDY

**Principal Financial Group**

## Industry:

Finance: Retirement and Insurance  
Target Area: Customer Service

## Challenges:

- Improve the customer service experience.
- Increase employee retention.
- Enhance recruitment of qualified customer service representatives.

## Solution:

Purdue Global (formerly Kaplan University) developed a customer service education program that solved Principal's critical skills gap.

## Benefits:

- Drive revenue through increased customer retention.
- Save costs by investing in/retaining current employees.
- Increase educational ROI.
- Promote from within via upskilling current workforce.
- Attract top talent.

# Improving Customer Service Through a Customized Employee Education Program

Principal Financial Group, a member of the FORTUNE 500®, helps companies and individuals plan for the future through retirement, insurance, and asset management. As “One of America’s Best Employers,”<sup>1</sup> Principal is dedicated to investing in its workforce. And, as one of the nation’s top providers of retirement plans,<sup>2</sup> Principal considers outstanding customer service central to the company’s core business objectives.

Principal recently identified a growth opportunity within its Group Claims and Operations, Specialty Benefits division.

This group, comprising more than 400 employees, had a strong need to improve customer service and increase customer retention.



From a business objective, retention is one of our primary barriers. This opened up an opportunity for career development, offering a perk, and pipeline development.



—**Sheila Grebert**, Assistant Director of Learning and Development, Principal Financial Group



Member of FORTUNE 500

Established 1879

Employees: > 14,000

Des Moines, Iowa

Principal.com



I have been surprised by [the University's] flexibility and thinking. We have to keep blending business and academia to go beyond traditional learning models and find new ways to solve problems.



— **Diane Howe**, Assistant Vice President,  
Group Claims and Operations,  
Principal Financial Group

Principal partnered with Purdue Global to close its gap on customer service skills, with an eye toward retaining valuable employees, attracting qualified talent, driving revenue, and improving customer satisfaction. As a strategic partner, Purdue Global devises custom education programs aligned to an organization's unique challenges and opportunities.

## A Collaborative Partnership Dives Deep Into Principal's Business Needs

### STEP 1: DIAGNOSE

To determine precisely how an educational investment could drive results, Purdue Global deployed a team of strategic learning experts to meet with Principal's leadership. As Principal is based in Des Moines, Iowa, the University's team included locally based experts such as the campus president, academic dean, and Career Services team at the University's Des Moines location. In addition to the primary goals of improving customer service, increasing employee retention, and attracting top talent, Purdue Global helped Principal identify the following secondary objectives for its Group Claims and Operations employees:

- Become more receptive to customers' needs.
- Better understand higher-level customer service strategies.
- Gain perspective on customer differences.
- Build customer service skills with challenging customers.



## Building a Product to Target Principal's Specific Requirements

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### STEP 2: DESIGN

Once the primary and secondary objectives were determined, Purdue Global's expert instructional design team customized a program to address the division's unique challenges through the following steps:

1. Present an existing Purdue Global course, AB 221: Customer Service.
2. Co-design a customized product that integrates:
  - Principal's business objectives
  - Scenarios, role-plays, and exercises in which employees critically examine business solutions
  - Best practices for Principal employees
3. Develop an innovative blended learning environment in which students could learn face to face, virtually via video feed, and remotely by phoning into class.
4. Co-design curricular guides by adapting Purdue Global curriculum to present Principal-specific learning opportunities (both in the classroom and online).
5. Integrate co-learning and discussion with department managers, whereby managers and students could co-learn and co-develop departmental objectives for process improvement.



By leveraging Principal's in-house knowledge and experience alongside the University's educational and curricular expertise, the program targeted the complex needs and issues within the Group Claims and Operations division.



Other institutions do not have the support the University offered.



— **Diane Howe**, Assistant Vice President,  
Group Claims and Operations,  
Principal Financial Group

## Custom Solution to Help Employees Achieve Desired Outcome

### STEP 3: DELIVER

Purdue Global delivered a personalized customer service educational package designed to produce business results. The program combined an interactive hybrid learning platform with content and activities particular to Principal's business model.

### Format/Delivery Customization

#### STANDARD

- Online
- Ten 1-hour online seminars
- One unit per session

#### PRINCIPAL

- Blended online/onsite
- Five 2-hour onsite classes
- Two units per session

### Onsite Course Leverages Principal's In-House Expertise

- Role-play scenarios
- Share cross-departmental ideas
- Have management serve on Q&A panels
- Co-learn and develop departmental solutions and strategies with employees and management

### Online Platform and Support

- 24/7 access to course and resources
- Weekly discussion board topics
- Virtual submission of weekly project
- Purdue Global academic support services



Source: December 2016 Kaplan University student course survey. Reflects responses of the 26 participants who completed the program. Note: this survey was conducted prior to the March 2018 purchase of Kaplan University by Purdue University and subsequent creation of Purdue University Global.



## Measuring Success and Results

### STEP 4: TRACK OUTCOMES

Twenty-six Principal employees enrolled in the customer service program. Through customized, competency-based reporting and assessment data, Purdue Global tracked program outcomes for these employees. Strong results show that the course was a success, with high satisfaction reported among students, as well as managers evaluating employees enrolled.

Additional opportunities identified:

- Articulate Principal's existing training to college credit to maximize employees' previously earned credit.
- Offer a tuition reduction to employees.
- Offer an annual employer tuition matching contribution.



We have always leaned on opportunities for leaders within the company. This program approached a different population that does not always get as many opportunities.



— **Diane Howe**, Assistant Vice President, Group Claims and Operations, Principal Financial Group



### ■ **Accreditation:**

Purdue Global is accredited by The Higher Learning Commission. This accreditation covers all our academic programs, all regional locations, and all programs provided via distance education. For more information, please visit the HLC website at [HLCCommission.org](http://HLCCommission.org) or call 800-621-7440.

### ■ **Total Enrollment:**

Approximately 27,000

### ■ **Degrees Awarded 2017–2018:**

More than 9,100

### ■ **Main Campus:**

Indianapolis, IN

### ■ **Regional Locations and Learning Centers:**

14

### ■ **Faculty With Doctoral Degrees:**

45%

Source for these data: Purdue Global Office of Reporting and Analysis, 2017–2018 academic year. Note: all figures include data prior to the March 2018 purchase of Kaplan University by Purdue University and subsequent creation of Purdue University Global.

For comprehensive consumer and gainful employment information, visit [Info.PurdueGlobal.edu](http://Info.PurdueGlobal.edu).

1 *Forbes*, 2017.

2 Defined Benefit retirement plans: *PLANSPONSOR* magazine, DB Administration Survey, May 2017; Nonqualified Deferred Compensation plans: Based on total number of NQDC plans, *PLANSPONSOR* Recordkeeping Survey, June 2017.

3 <https://www.timeshighereducation.com/student/best-universities/best-public-universities-united-states>. Rankings apply to Purdue University West Lafayette and not to Purdue Global

## About Us

Purdue Global delivers a fully personalized, world-class education tailored for working adults. The University offers more than 180 online programs, and has locations in Iowa, Indiana, Nebraska, Maryland, Maine, Missouri, and Wisconsin.

The Enterprise Learning Solutions (ELS) division of Purdue Global forges strategic partnerships with companies and organizations to improve business outcomes through innovative learning solutions.

### **NATIONALLY RANKED AND RESPECTED**

Purdue Global is part of the respected Purdue University system. One of the most prestigious research universities in the world, Purdue University is ranked in the top 10 best public universities in the U.S. by *The Wall Street Journal/Times Higher Education*.<sup>3</sup>

Discover what Purdue Global can do for you at [EducationPartnerships.PurdueGlobal.edu](http://EducationPartnerships.PurdueGlobal.edu) or call **800-811-9819**.

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