



Insurance | Risk Management | Consulting



# Organizational Wellbeing and the Power of Leader Influence

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Global Innovation Leader, Organizational Wellbeing

May 19, 2025  
Columbus, OH



# We've Changed

New priorities are changing how we feel about work



- Rejection of status quo
- Less willing to compromise



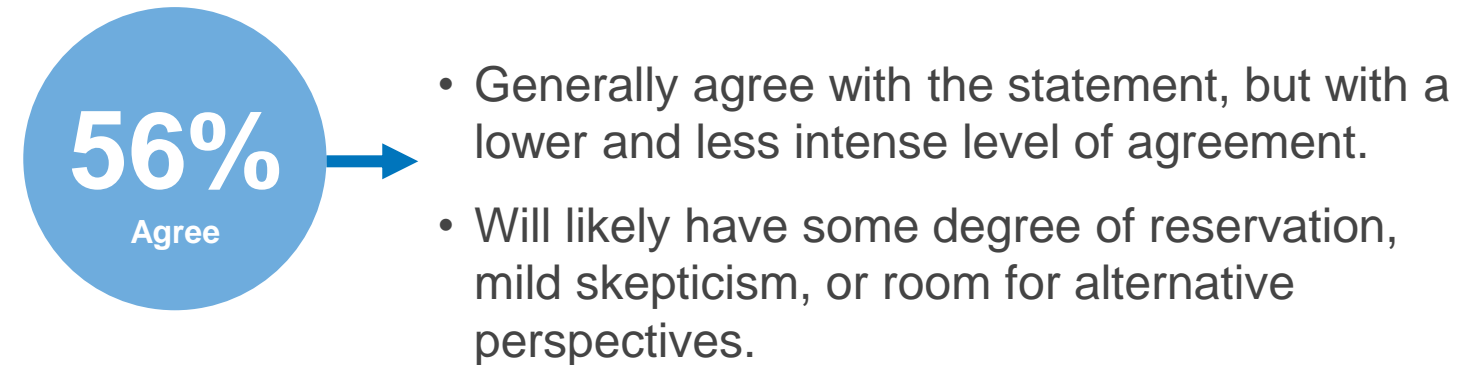
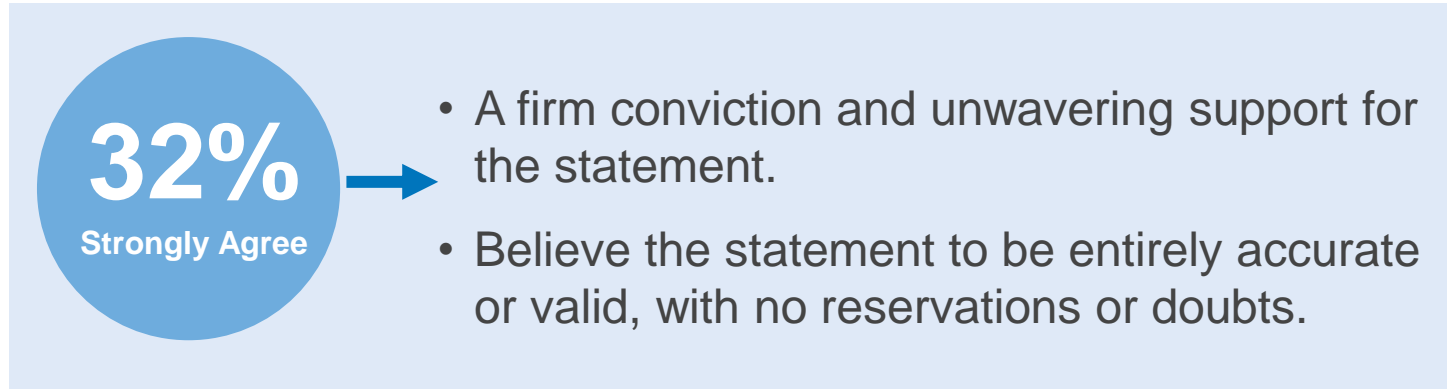
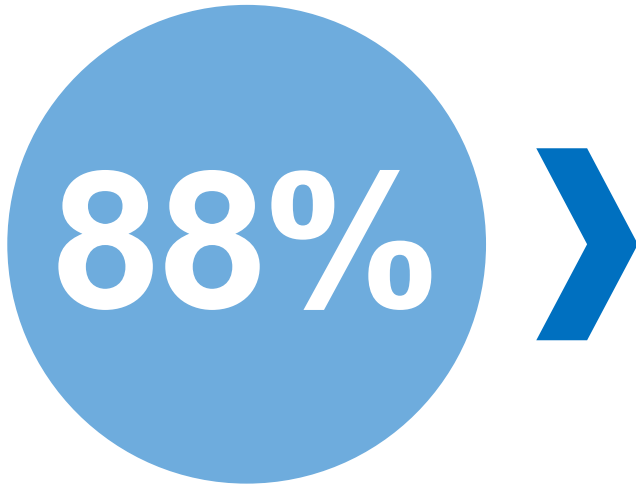
- Purpose over profit
- Wellbeing as cultural imperative
- Stability



- Boss to Coach
- Supportive, trustworthy, caring

# Digging into “care”

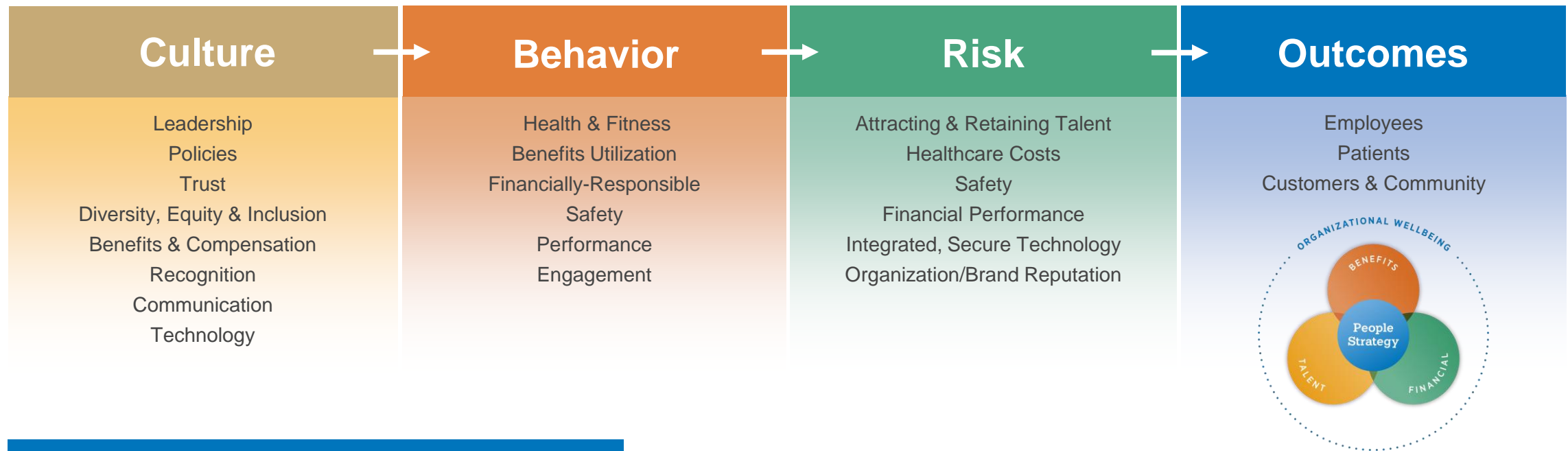
My workplace cares about my wellbeing...



# Organizational Wellbeing

We help people and organizations secure a confident future through our proactive people strategies.

*When your people thrive, so does your organization's wellbeing*



## How we do it:

### Data & insights

We'll help you prioritize your people investments based on your organization's demographics, cost drivers, culture and goals

### Technology

Our digital solutions and technology infrastructure will meet the needs of you and your people

### Trust

With empathy and a client-centric approach, we foster long-term relationships and evolve our solutions to address your changing needs

**It's all connected.**

# Top People Concerns for Healthcare Leaders

Understanding generational characteristics increasingly important

	Overall	Gen Z (<28)	Millennials (29-44)	Gen X (45-60)	Boomers (61-79)
<b>1</b>	Retention	Employee Wellbeing	Retention	Retention	Succession Planning
<b>2</b>	Manager Effectiveness	Training & Development	Training & Development	Manager Effectiveness	Employee Wellbeing
<b>3</b>	Build/Maintain Culture	Attracting New Talent	Attracting New Talent	Burnout	Retention
<b>4</b>	Attracting New Talent	Build/Maintain Culture	Burnout	Employee Wellbeing	Build/Maintain Culture
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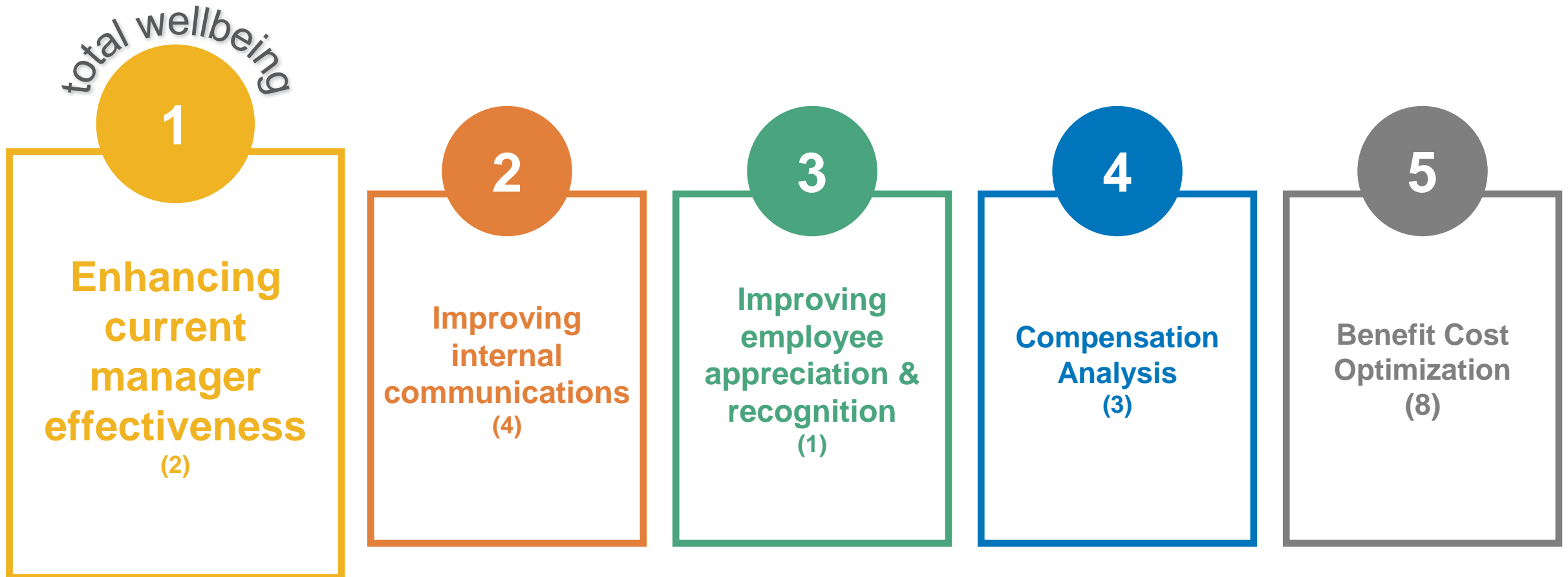
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# Strategic Priorities

What are your top five (5) strategic priorities for attracting, retaining and engaging talent in 2025



# Wellbeing Status

What's the why, the plan, and are we making progress?

## Top 5 Wellbeing Objectives:

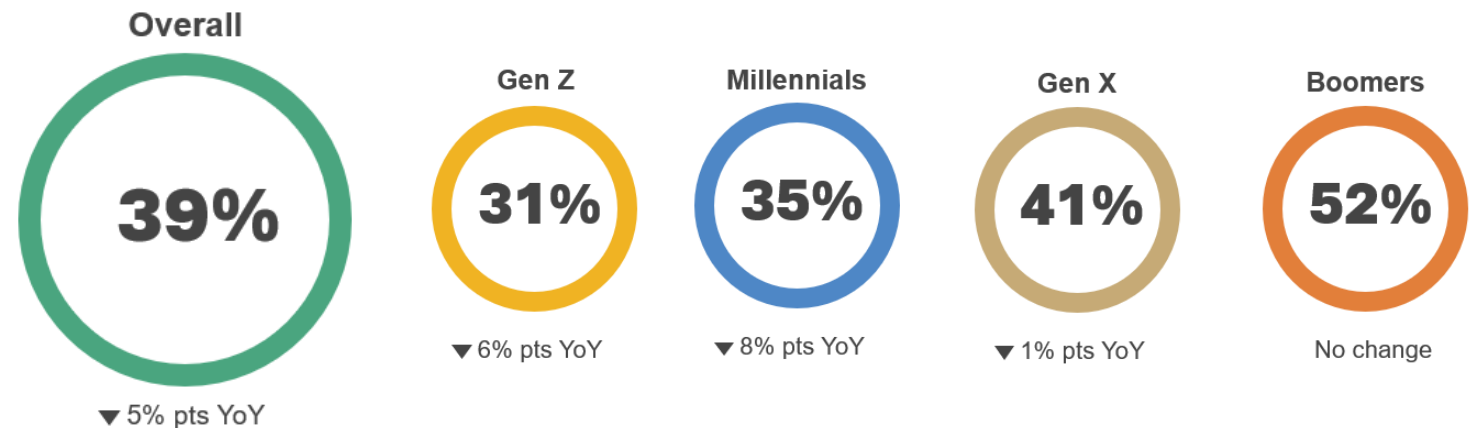


MetLife's 23<sup>rd</sup> Annual Employee Benefit Trends Study  
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# 45%

Have confidence in the effectiveness of our current wellbeing strategy.

## Holistic wellbeing includes mental, financial, social and physical health



# Enhancing manager effectiveness

How are you focused on developing/implementing skills/services to enhance manager effectiveness?

Enhancing communication skills

72%

Providing meaningful feedback

69%

Effectively navigating difficult conversations

60%

Effectively supporting employee mental health

51%

Enhancing individual and team resiliency

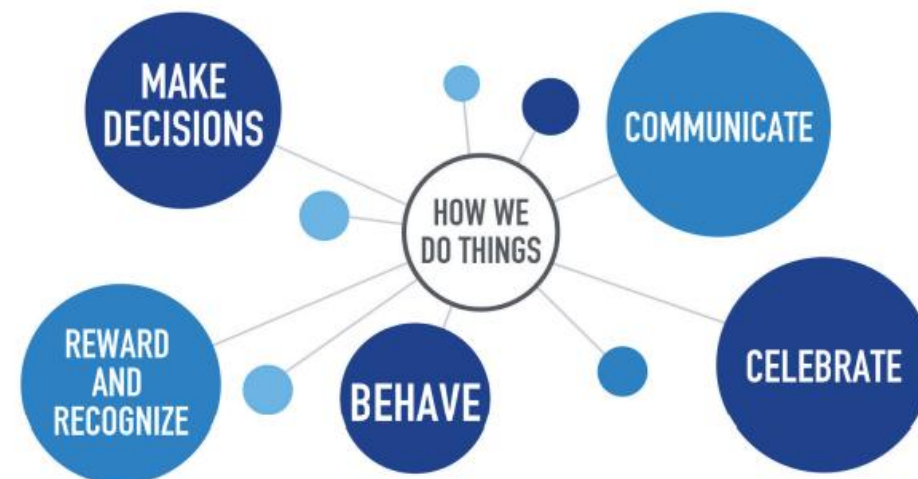
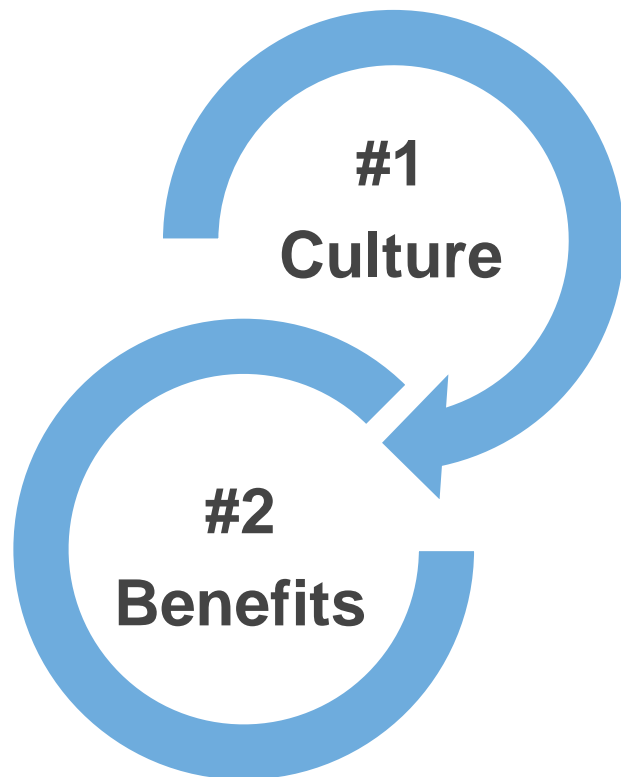
41%

Implementing coaching services for managers

40%

# Culture is your currency

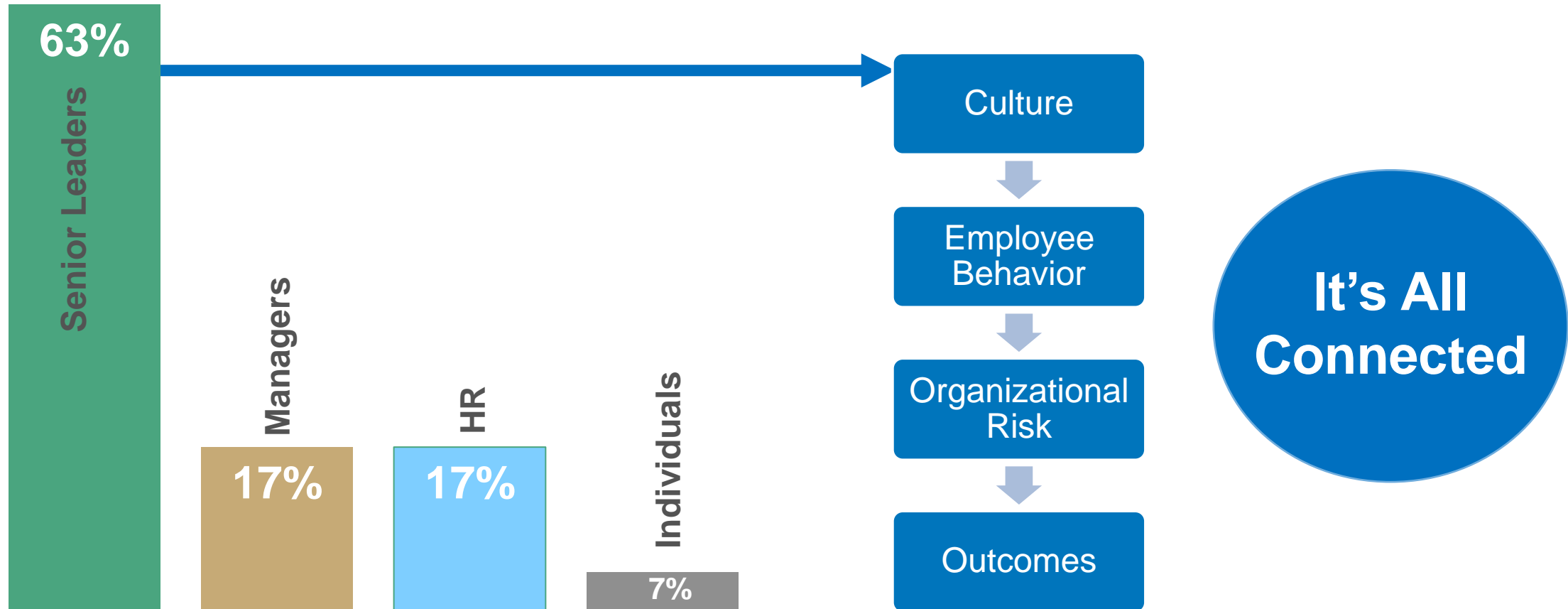
Beyond base salary, which components do you leverage the most to attract key talent?



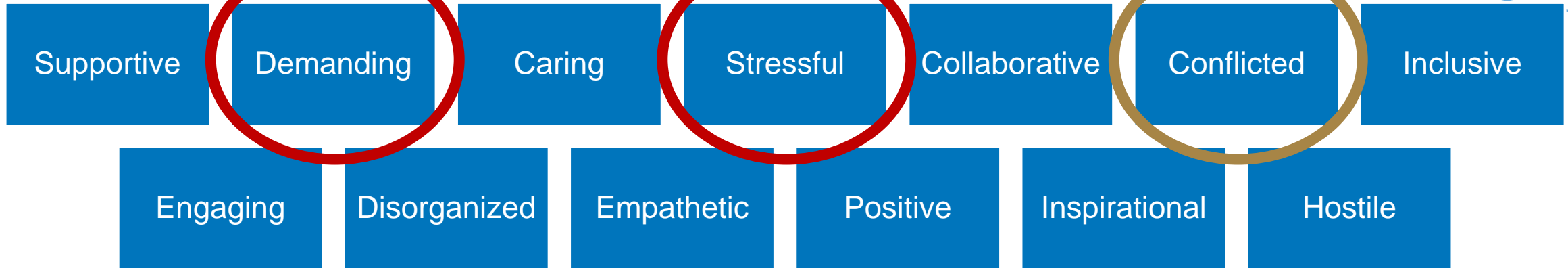
## Culture influenced by:

- Policies
- Practices
- Behaviors

# Whose primary job is it to shape/create it? What's the connection to benefits and wellbeing?



# Culture Current State



Top 3	Bottom 3
Collaborative	Positive
Demanding	Inspirational
Caring	Hostile

Compared to a year ago, culture has improved or significantly improved

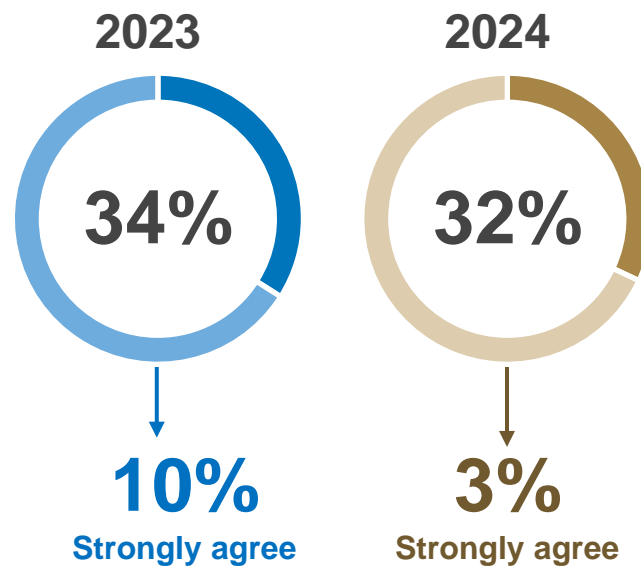
16%

# Culture Accountability

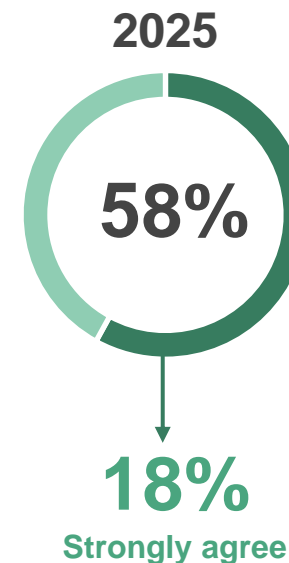
**Culture is influenced by:**

Policies  
Practices  
Behaviors

“Our Employee Value Proposition reflects the **actual work experience** within our organization”.



“In my organization, leaders are **held accountable** for their **behaviors and actions**”.



# Workplace Conflict

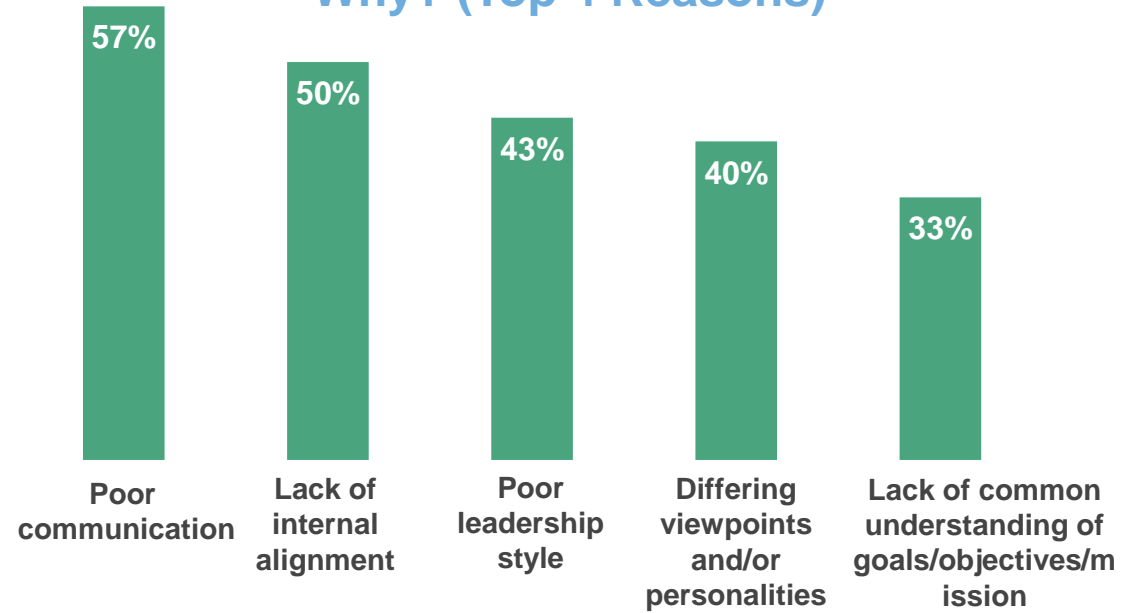
Conflict within our organization is increasing

29%

Gallagher Organizational Wellbeing Poll: October 2024

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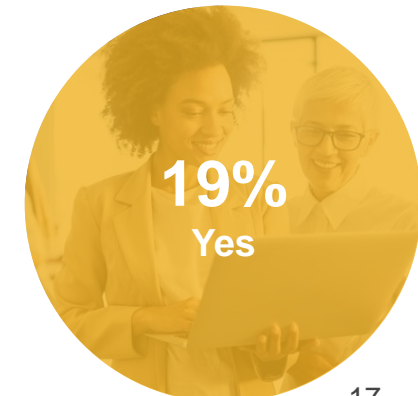
## Why? (Top 4 Reasons)



When conflict exists, how well is it addressed?



Leaders equipped to manage in a positive way



# Burnout

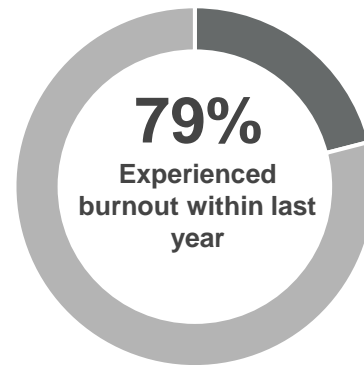
Where does burnout rank amongst top people concerns for leaders?

**2022: #1 for all**

**2024: #7**

**2025: #5**

Burnout continues to be an issue... experienced by many, and negatively impacting work



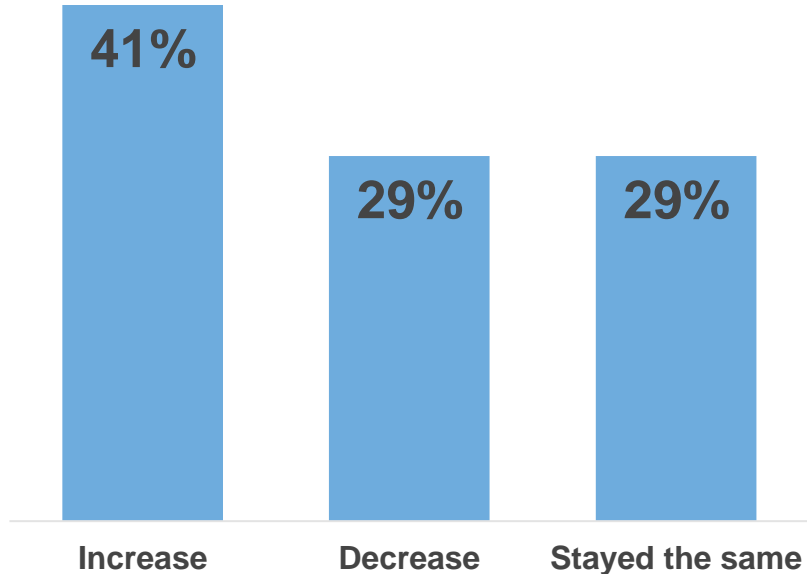
When you think of your role, do you experience any of the following:



# Stress in Healthcare

## Mixed News

During the past year my stress level has:



- 46% Focused efforts to clarify expectations and prioritize work tasks
- 44% Personalized financial counseling
- 42% Inventorying resources to identify gaps or areas of opportunity
- 41% Hybrid work options
- 33% Emergency fund support
- 28% Developing Employee Resource Groups (ERGs) focused on wellness

# People Metrics that Matter

Most important people metrics for determining future business success

① Employee Engagement

② Turnover Rate

③ Trust in Leadership



Most significant leadership competencies required for success

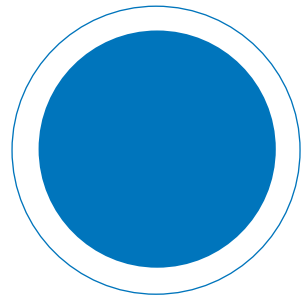
① Communicating Effectively

② Strategic Thinking

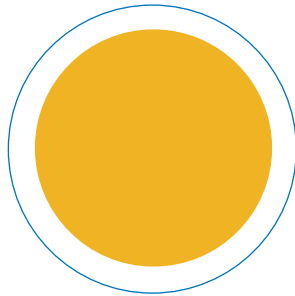
③ Ability to Build Trust

# Key Qualities Desired in a Direct Manager

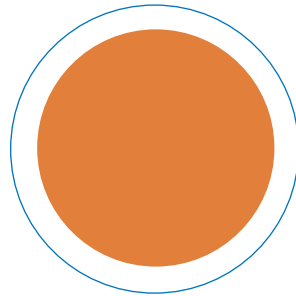
What are the most important qualities to you in your direct manager? Select all that apply:



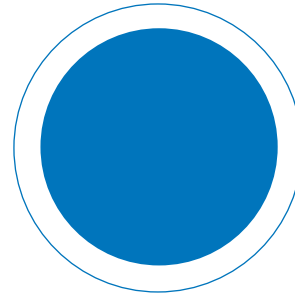
**Effective Communicator**



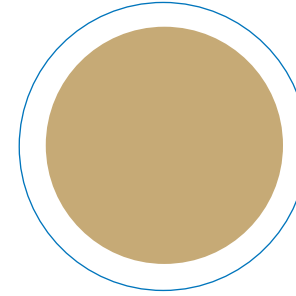
**Trustworthy**



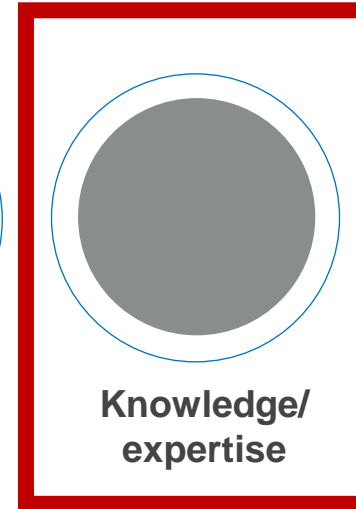
**Consistent**



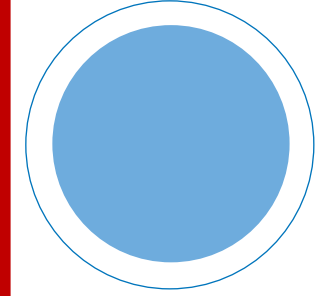
**Visionary/  
forward thinking**



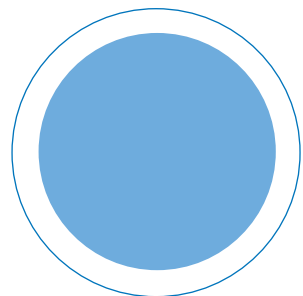
**Open-minded**



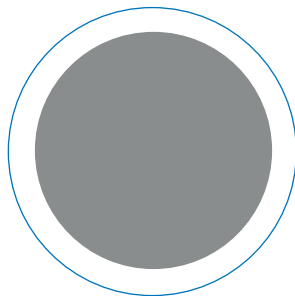
**Knowledge/  
expertise**



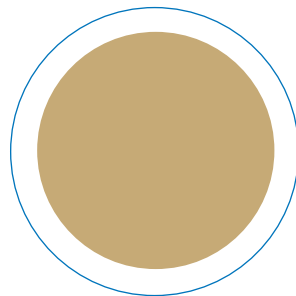
**Empathetic**



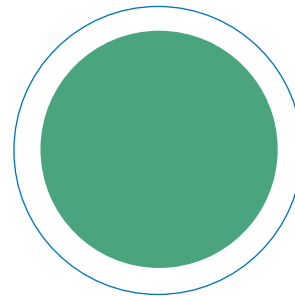
**Gratitude**



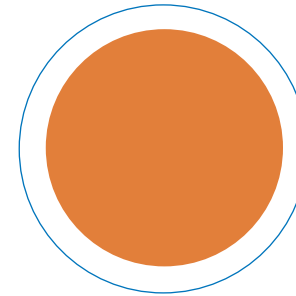
**Humility**



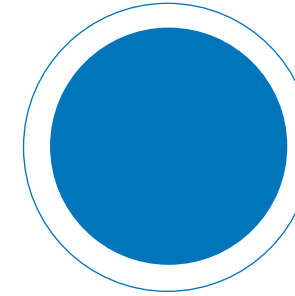
**Sense of humor**



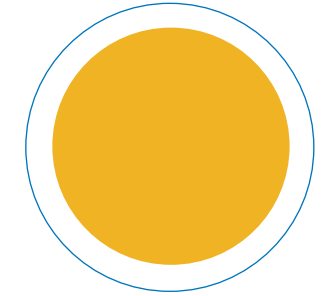
**Courage**



**Influence**



**Inspirational**



**Other**

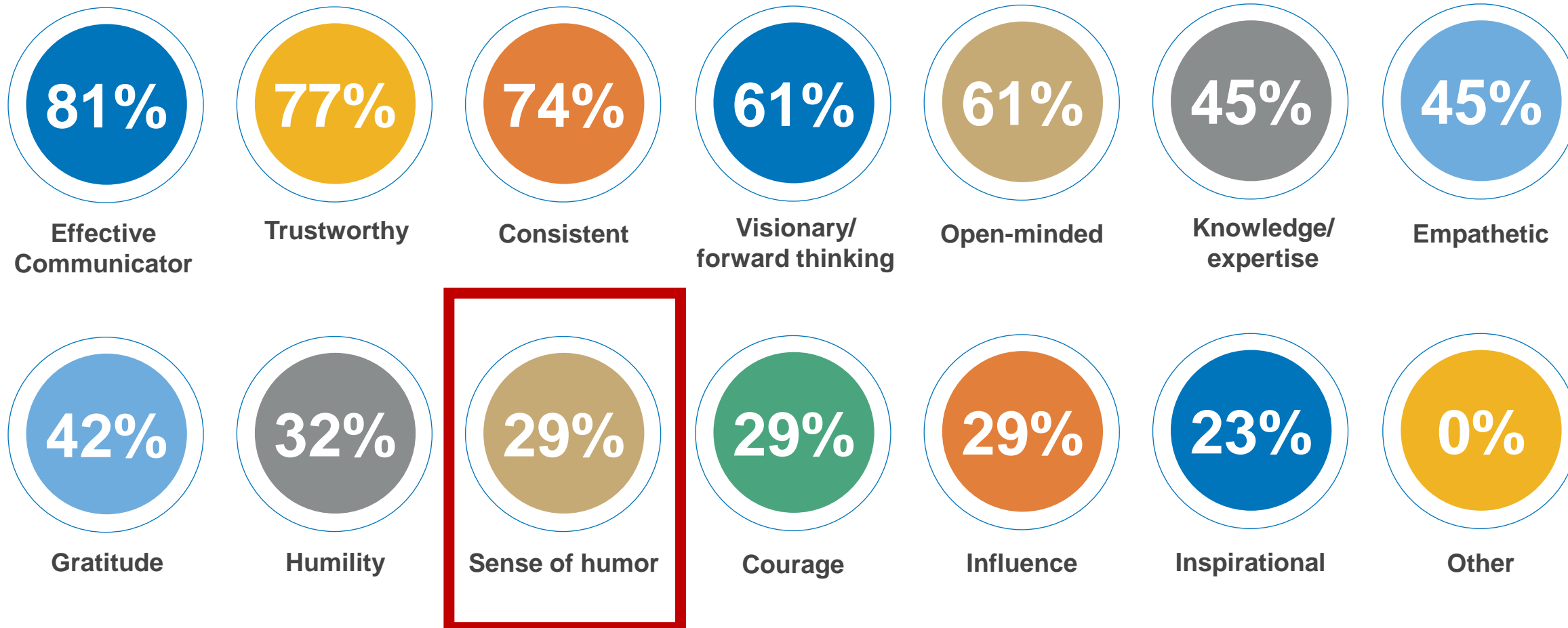
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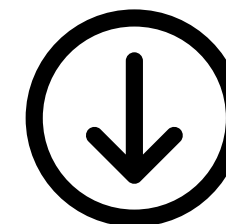


# Why do we care about trust?

In high trust organizations...



Current % of responders who strongly agree that there is a high degree of leadership trust in their organization:



**11%**

Harvard Business Review: The Neuroscience of Trust: 2017  
Gallagher Organizational Wellbeing Poll: Stress, Culture & Leadership: May, 2025

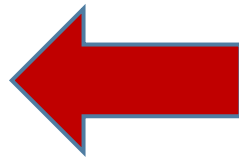
# Trust busting and building

## Trust BUSTERS

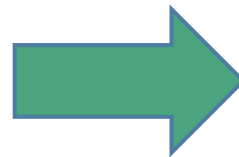
- 1 Making promises you can't keep
- 2 Disconnect between what you say and how you behave
- 3 Micromanage and resist delegating
- 4 Spinning the truth
- 5 Downplay others' talents, knowledge and skills
- 6 Tolerate toxic behavior

How do you build trust?

Less This



More This



## Trust BUILDERS

- 1 Lead by example. Want trust? Give trust!
- 2 Communicate openly and honestly
- 3 Model institution values
- 4 Foster teamwork and quality collaboration
- 5 Allow and lead with vulnerability
- 6 Demonstrate care
- 67 Recognize and appreciate

# Recognition as a



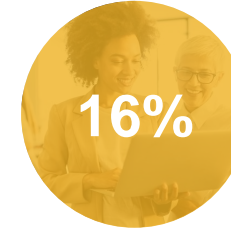
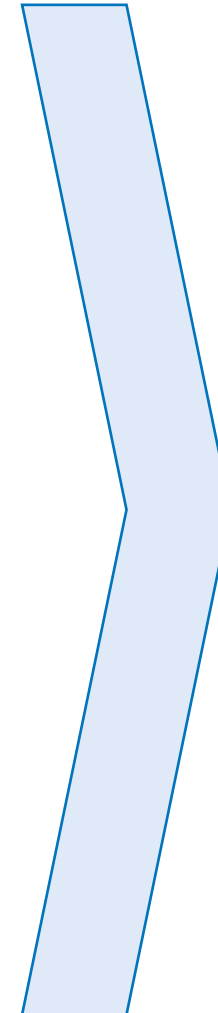
**More  
Productive**



**More  
Loyal**



**More  
Resilient**



*Workplace contributions are effectively recognized within our organization*

- **S**pecific & Connected
- **A**ppropriate (Platinum Rule)
- **G**enuine
- **E**quitably delivered



*Provide best practice training to managers*



Career Stage	Exploration	Establishment	Mid-Career	Late Career	Pre-Retirement
Demographic	GenZ or iGen	Millennials	Late-stage Millennials to Gen X	Late-stage Gen X to Boomers	Boomers
Priorities	<ul style="list-style-type: none"> <li>Diversity, Equity and Inclusion</li> <li>Social causes</li> <li>Mental health</li> </ul>	<ul style="list-style-type: none"> <li>Career development</li> <li>Workplace culture</li> <li>Financial wellbeing</li> </ul>	<ul style="list-style-type: none"> <li>Work/life balance</li> <li>Compensation</li> <li>Career development</li> </ul>	<ul style="list-style-type: none"> <li>Leadership roles</li> <li>Recognition and appreciation</li> <li>Financial security</li> </ul>	<ul style="list-style-type: none"> <li>Financial security</li> <li>Mentoring opportunities</li> <li>Flexibility</li> </ul>
Communication Preferences	<ul style="list-style-type: none"> <li>Personalized and verbal communication</li> <li>Honest and direct</li> <li>Values collaboration and teamwork with peers</li> </ul>	<ul style="list-style-type: none"> <li>Heavy reliance on technology / electronic means of communication</li> <li>Incredibly tech savvy</li> </ul>	<ul style="list-style-type: none"> <li>Have witnessed the transition to a more tech-based communication style</li> <li>Most still prefer a face-to-face meeting</li> <li>Flexible and adaptive</li> </ul>	<ul style="list-style-type: none"> <li>Blunt and direct</li> <li>Meetings should only be for topics requiring face-to-face communication</li> <li>Email is go to communication</li> <li>Straight talk- do not attempt to micromanage</li> </ul>	<ul style="list-style-type: none"> <li>Favor voice communication</li> <li>Prefer a balance between email, voicemail, face-to-face communication and meetings</li> <li>Drive for success gives “call me anytime” mentality</li> </ul>
Trust Builders / Breakers	<ul style="list-style-type: none"> <li>Want the opportunity to share</li> <li>May not feel comfortable with a company sharing their feedback</li> </ul>	<ul style="list-style-type: none"> <li>Need to be careful about words you use when communicating with a millennial (verbal or electronic)</li> </ul>	<ul style="list-style-type: none"> <li>Value based motivation</li> <li>Incorporating multiple channels prioritized by the type of urgency of messaging</li> </ul>	<ul style="list-style-type: none"> <li>Do not call off work hours</li> <li>Value work/life balance</li> </ul>	<ul style="list-style-type: none"> <li>Prefer being called by their first names</li> <li>Appreciate when you use them as a sounding board/ seek their advice</li> </ul>
Recognition Preferences	<ul style="list-style-type: none"> <li>Want frequent feedback from managers</li> <li>Value frequent check-ins with managers</li> <li>Highly independent</li> </ul>	<ul style="list-style-type: none"> <li>Tend to be idealistic requiring prompt feedback and meaningful interaction</li> </ul>	<ul style="list-style-type: none"> <li>Value growth and leadership opportunities</li> <li>Value social responsibilities in organizations</li> </ul>	<ul style="list-style-type: none"> <li>Not enamored by public recognition</li> <li>Find that freedom and time off are the best rewards</li> </ul>	<ul style="list-style-type: none"> <li>Feel rewarded by money, recognition, and awards for their hard work and long hours</li> </ul>

# Leader Skills & Competencies are Evolving

Emotions, behaviors and skills that optimize performance, health & happiness...

- Gratitude
- Compassion
- Empathy
- Realistic Optimism
- Humility

Positive emotions can enhance physical health, and our sense of connection to others



**RESILIENCY**

Authentic  
Sincere  
Vulnerable



**TRUST**

Psychological  
Safety



**INNOVATION**

**Organizational Wellbeing**

# Demonstrating Care through Culture & Benefits

The path to ensuring your strategy and the efforts of your team are focused on the areas most important to your business and most relevant to your employees requires a multi-step Organizational Wellbeing approach

## Understand The Market

- Benchmarking
- Compensation Analysis
- Regulatory Environment/Compliance
- Healthcare Analytics

## Know Your Workforce & Employee Voice

- People Insights/SDoH Analysis
- Generational Characteristics
- Leadership Alignment
- Employee Engagement Surveys
- Benefit Preference Surveys
- Focus Groups

## Build Proactive People Strategies



## Live it...

- Communications
- Focus on Trust
- Accountability/Modeling
- Employee Value Proposition
- Training & Development
- Leadership Development

**Do not underestimate the power of your influence...**



# Thank you

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Kathleen Schulz, MS, CHES

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