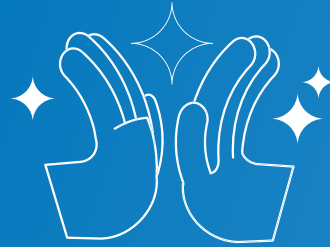


WELCOME *to the* TEAM

Gallagher's specialist employee communication practice



Creativity Starts Here.

The work we do carries the power to change lives. We support some of the world's leading organizations with solutions to some of the most critical challenges.

Our People and Culture colleagues will fill you in on the wider Gallagher business and introduce you to our internal platforms. But first, let's learn about the who, what, when, and how of the Communication Practice.

Are you ready to get started?

We're excited you're here.

You should know, we're doing something pretty special here. Sure, we make things look nice with pretty designs. But that isn't what we're about. We're about changing lives. We help businesses reduce their costs, maximize their profits, and increase employee engagement.

But ultimately, the work we do helps people live happier and healthier lives in and out of work. The work you do here at Gallagher will change lives.

It's great to be working with you!



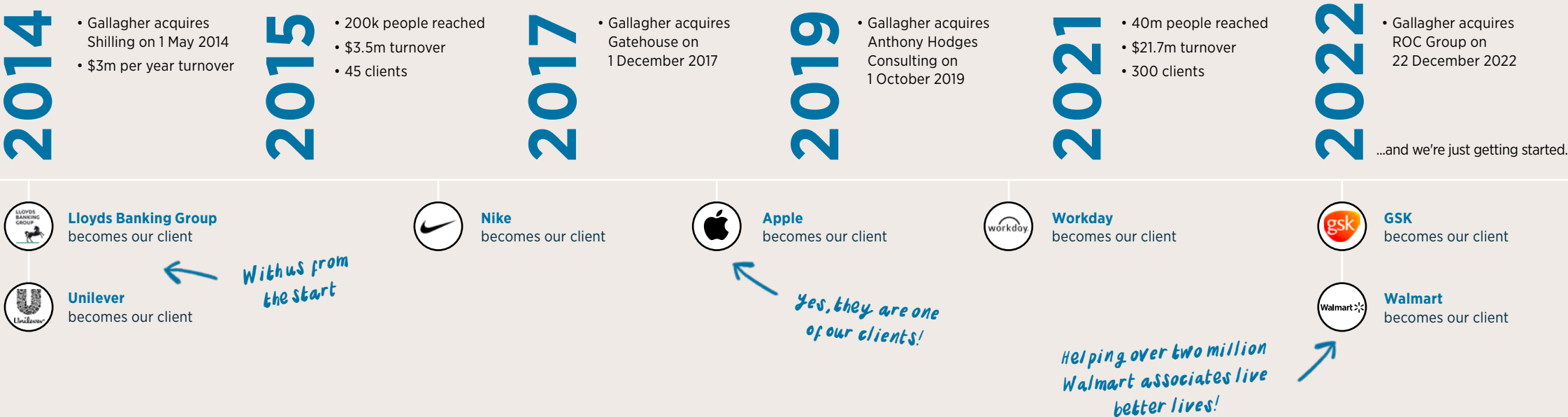
Ben Reynolds

Global Practice Managing Director



We hate to draw attention to ourselves, but...

You should know who you're working with. We're extremely proud of what we've accomplished in just eight years. With new wins every day and a client roster that grows bigger every year, it's impossible to collapse all we're grateful for onto a single image. But here's a glimpse of our highlight reel:

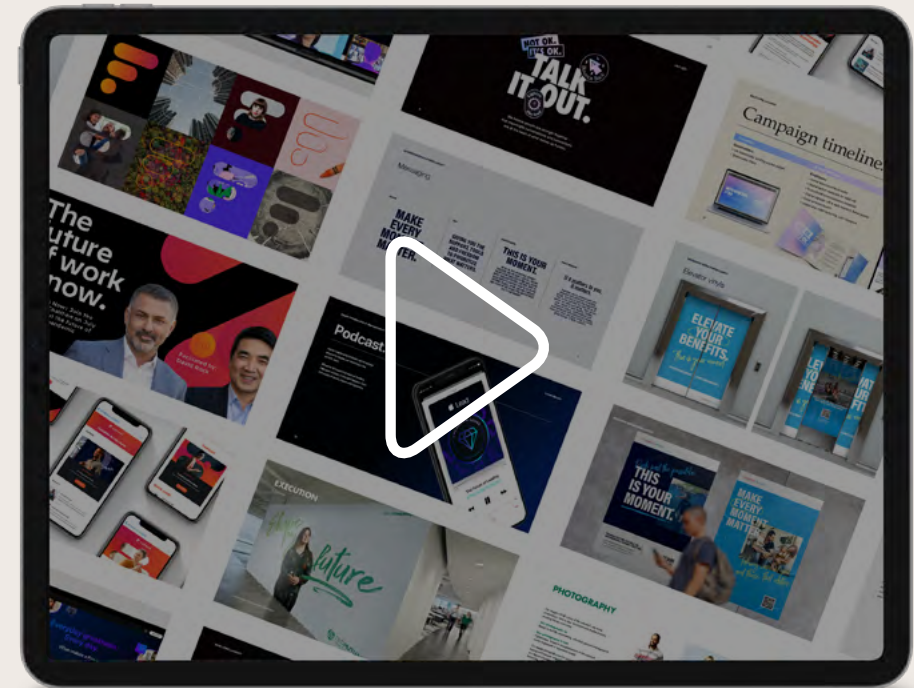


Who we are.

**The Communication Practice is much more than emails and home-mailers.
We create waves that move you.**

We're a team of over 180 passionate communicators dispersed across the globe, but we don't let distance dictate our connection. Together, we're reimagining the purpose, strategy, and culture of the places people work, and driving behavioral transformation for some of the biggest household names on the planet.

Using data, analytics, and our own insight, we focus on outcomes—rather than output—and deliver solutions that instigate change. By understanding what makes work, work—it's people—we can transform a workforce into a force of nature.



[Hit play to check out more of the awesome communications we've created.](#)

Our game plan / 1.



Ways of working

As part of your induction process, we'll walk you through how your team works. We'll also show you how the processes we use to ensure that everyone working on a project, whatever team they're in, knows exactly what they should be doing at each stage.

As well as learning on the job, you'll be provided with in-house training on the systems we use, and we'll assign you a buddy, who'll be there to check in with regularly and help you find your feet.

We've gained the trust and respect of our clients by following our project processes and guides at every stage of a project. You can familiarize yourself with our key process documents at **Z:\GBS UK\Communications\Office Templates\GC-0001 Internal\WOW Documents and forms.**



Microsoft Teams

As a busy agency we are always bouncing ideas and messages to each other. We use Microsoft Teams to do this. Like any instant messenger, it's easy to get carried away pinging people left, right and center. So we've put some guidelines in place to help respect each other's time.

First, 'Do not disturb' means exactly that—try to wait until a colleague has taken themselves off this mode before sending them a message.

Second, don't forget to put yourself in 'Do not disturb' before presenting in a meeting.

Last, always ask if someone is free before calling them out of the blue. There's nothing worse than being interrupted while you're deep in a flow state!



We're not just each other's biggest fans. Our team's wonderful 'desk mascots' are always there to share the love too.

Our game plan / 2.



Working hours

Our core hours are 10am to 4pm, which means you can start at any time between 8am and 10am, and finish any time between 4pm and 6pm—as long as you're available for key team and business meetings and your line manager is aware of your preferred hours. While these are our standard hours, you may have agreed something else, so please follow the working hours stated in your contract in the first instance.

Lunch is one hour and you need to eat to be your best. So take it when it suits you, as long as you're not missing a scheduled event.

As a global agency working in several different time zones, you may have to work outside your scheduled hours from time to time—it's the nature of the beast. If it's happening regularly, talk to your line manager about taking a longer lunch that day, or starting later in the morning. A global practice requires flexibility from all points of the spectrum—and we're okay with it!



Before we meet

When setting up a meeting it's important to follow some rules of etiquette:

1. Add an agenda so everyone is clear what the meeting is about and what its objectives are.
2. Arrive on time. Everyone's time is valuable.
3. Schedule meetings for 25 mins/50 minutes. In a world of constant meetings, burnout is real. Give your colleagues and yourself time for a breather between meetings.
4. It's important to get outside once in a while, so ask your colleagues if they'd like to take a walking meeting once in a while. A bit of fresh air never hurt anyone!



Our game plan / 3.



Agile/hybrid working

To survive is to adapt, and there's nothing quite like a global pandemic to usher in an era of change. In order to continue delivering the award-winning communications our clients have grown to expect, we transitioned to working from home.

While working remotely, we learned how to operate a truly-global communication practice, and were able to recruit some of the best talent from around the world. But with a new normal established, there are still some old habits we're not keen to let go of. As communicators, we know that magic happens when we're together, so we're excited to be re-opening our offices and inviting colleagues to choose the way of working that suits them best as part of an agile/hybrid model.

It's agile because you can adapt how you work to fit your needs, as long as you're meeting the expectations of your team and clients in the process. And it's hybrid because we

want to see you at the office, too. We like your face and your smile and well, we just want to spend time together, even if it's just once a week. It's up to you how you mix up your days, as long as you discuss your working arrangements with your line manager so we can all know how you work best.



How we dress

We're a creative agency, so it's a given that we'll express ourselves in the way we dress and present ourselves.

Just keep it professional when you're in the office and keep it smart when you're meeting clients, especially if it's happening face to face.

Of course, there's a lot more leeway if you're working from home; just make sure that what we see of you on camera is business appropriate!

If in doubt, just ask a colleague.



Our game plan / 4.

Touch points and anchor days

Adopting this agile/hybrid way of working means that it's more important than ever that we make the effort to be around for team meetings, business updates and collaborative project work when we're required to be.

From the day you arrive at Gallagher, you're an important part of the team. So, if you have weekly team meetings, head into the office for those—because spending time in real life with your team is the quickest way to feel part of it.

We also host regular communication practice and business updates. These help us to get a picture of how the business is performing and to understand our direction of travel. We'll expect to see you in the office for these anchor days too. Talk to your line manager if you'd like to switch your regular office day(s) so you can be in for an anchor day instead.

Let's get you settled in

While you're settling in, your line manager will probably ask you to be in the office a couple of days a week. That's because there's no substitute for being able to sit in the same space as someone who can show you the ropes, be on hand to guide you while you find your feet, and just show you how we work.

Your line manager will draw up a plan with you that will also include meetings with other teams in the practice, in-house training, and any additional needs you identify together.

Top standards only

We proudly hold ISO 9001 and 27001—internationally recognized standards that govern how we operate from a quality and data security perspective.



Our projects / Kicking things off.



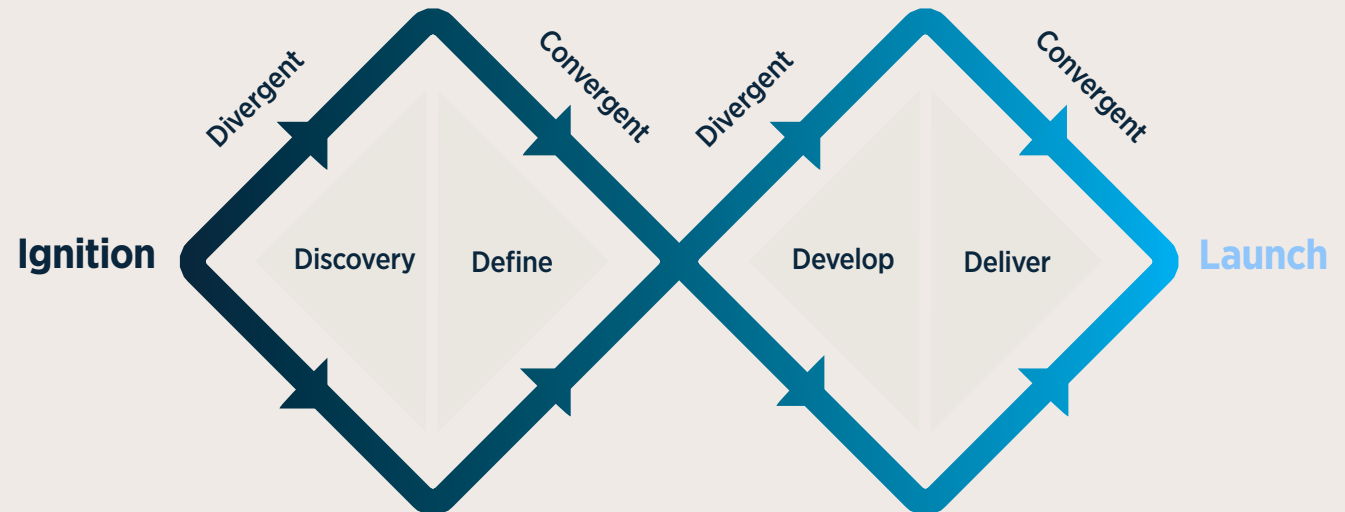
Getting projects moving

Every project we manage begins with a Right Foot meeting. These are only 30 minutes long, but it's perhaps the most important half hour of the entire project. The project team reviews the brief provided by the client to gain understanding of the task at hand before taking any further steps.

The Client Services Team will create a brief which outlines the initial request from the client. They will bring it to the Right Foot meeting and the project team will discuss its contents to get to the bottom of the 'why' of the problem.

Only when we understand the problem can we think about the solution. So, once the brief has been agreed upon, the project team will meet again to brainstorm solutions.

We call this process the 'double diamond' and we use it for all of our projects to ensure we're really scratching beneath the surface of our client's needs and wants. By following this process we ensure each and every project starts on the 'right foot'.



Our projects / Kicking things off.



Statement of work

Once we've unpacked the client's request and are ready to make our recommendations, we draft a Statement of Work (SOW). This outlines our understanding of the client's brief and the work we'll undertake to interpret it.

The SOW is also an important opportunity for the client to check they're happy with our interpretation of their brief, the scope of the project, and the outcome we'll be delivering for them. Once the client has signed it off, the work can begin!

① Job numbers

After the SOW is signed, a job becomes active and needs to have job codes assigned to it in Synergist.

Synergist is our project management and time keeping system that we use to identify communication deliverables. It also allows us to track the hours spent working on a client project.



Our projects / Kicking things off.

The brief

As we've already spoken about in the 'Getting projects moving' section, once we've had our Right Foot meeting and the SOW's been signed off, we complete and share the brief with the project team. This allows all the teams who are going to be involved in the project to be on the same page about what is in scope.

The brief is constantly referred to by the project team, helping everyone stay on track. It will address everything from audience size to tone of voice, from which channel(s) we'll be using to the number and type of statistics we'll need to gather.

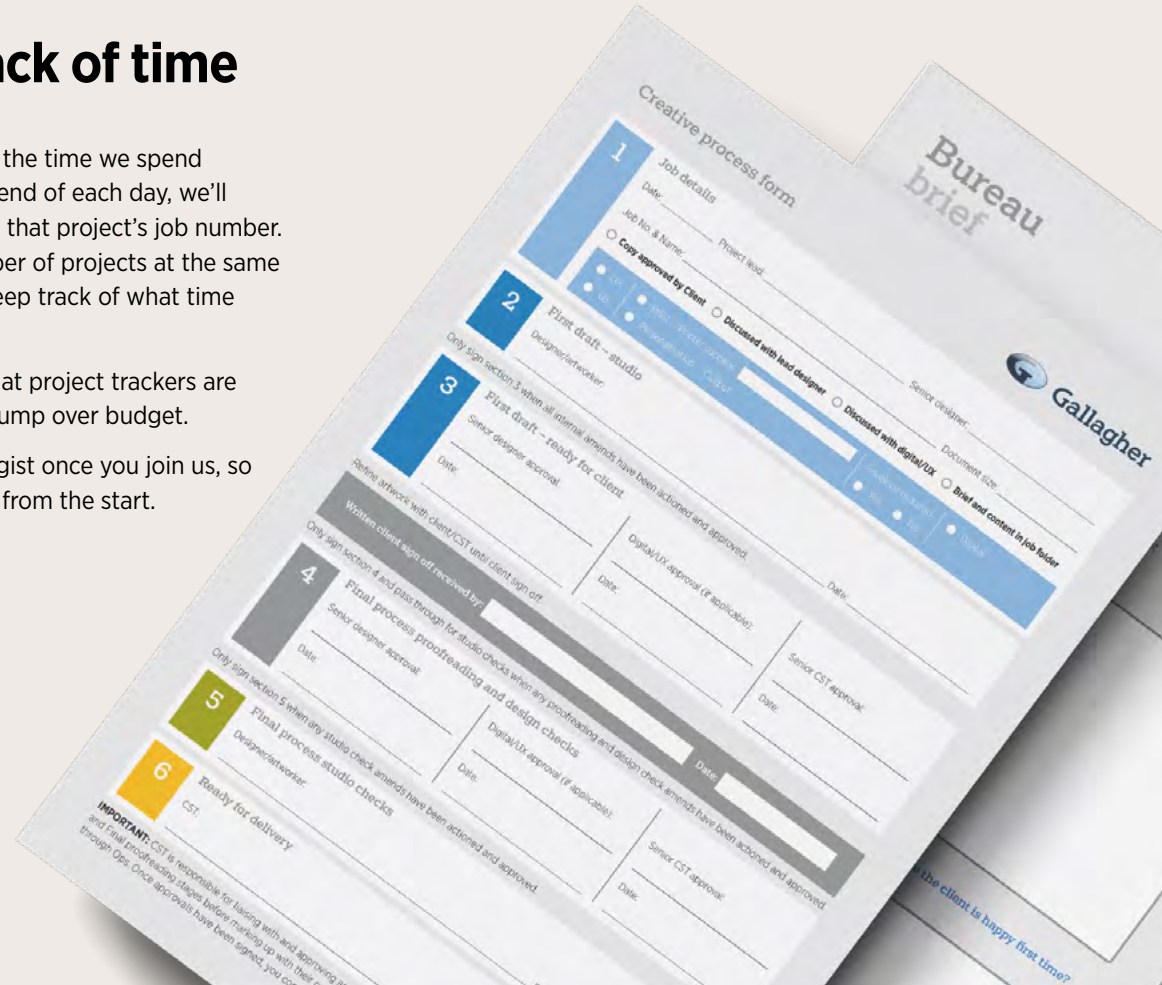
While the SOW helps define the project with the client, the brief defines the project internally. It's key to all projects.

Keeping track of time

As an agency, we bill our clients for the time we spend working on their project. So, at the end of each day, we'll record our time in Synergist against that project's job number. You'll usually be working on a number of projects at the same time, so this means we can easily keep track of what time we're spending on each.

It's crucial to record time daily so that project trackers are kept up to date and projects don't jump over budget.

Ops will train you how to use Synergist once you join us, so you'll be able to log your time from from the start.



The image shows two overlapping documents. The top document is a 'Creative process form' with a blue header and a numbered list of six steps. Step 1 is 'Job details' with fields for Date, Job No & Name, and Project level. Step 2 is 'First draft - studio' with a 'Designer/worker' field. Step 3 is 'First draft - ready for client' with a 'Senior designer approval' field. Step 4 is 'Final process proofreading and design checks' with a 'Senior designer approval' field. Step 5 is 'Final process studio checks' with a 'Designer/worker' field. Step 6 is 'Ready for delivery' with a 'CST' field. The bottom document is a 'Bureau brief' with a blue header and a 'Gallagher' logo. It has a 'Senior designer' field and a 'Document size' field. The form is titled 'Creative process form' and 'Bureau brief'.

Our projects / Kicking things off.



Data: Love it or hate it

Last but not least, let's talk about data. Some of us love working with data, others want to run a thousand miles whenever it's mentioned!

Regardless, it's important to understand how to handle data correctly as it is used frequently by the team during projects.

The first rule of data is to always send it securely using our preferred tool **Sharefile**. It's also fine to use the client's own secure platform if they prefer.

We take data protection very seriously, so if you're ever in doubt about how to handle or store it, speak to a colleague for clarity before acting.

If you're still in doubt, contact your line manager.



Business objectives

There's one more thing we all need to keep in the back of our minds while we work, and that's our business objectives:

- Client retention and growth
- Continuing profitability of existing clients
- Staff motivation towards business success
- Continuing profitability of the company
- Focus on our own personal and professional growth

Trust the process

Before we kick things off, remember to check out our key process documents at **Z:\GBS UK\Communications\Office Templates\GC-0001 Internal\WOW Documents and forms.**



Where we are.

The Communication Practice works with clients across the globe. We have an ever growing team of 180 communication professionals based in the UK, US, Canada and Australia.



Our values.

Think of our values as our Ten Commandments, even though there's only four.

Our values are shared beliefs that informed our strategy from the very start, and continue to provide the foundation for the company we are today.

They are our shared beliefs. The foundations for our values and practices that inform everything we do, from experience to how we work as a team.

Remember, these are your principles to own. It's up to you to make them part of your everyday.

1. We represent real people.
2. We rise to any challenge.
3. We learn at every opportunity.
4. We care about what we do.

This is who we are

Everyone who works at Gallagher knows about the Gallagher Way—a set of 25 tenets that define our culture, our ethics, and our way of treating each other. The Gallagher Way informs everything we do. Find out more at www.ajg.com.

*"We are a warm,
close company. This
is a strength—not a
weakness."*

Tenet 23
The Gallagher Way

Our values.

We represent real people

We're not the first people to think of having our clients' and their employees' best interests at heart. But we do it the best.

Our dedication is singular and as individualized as possible. We challenge our clients to develop experiences that engage their employees because what we do makes a real difference to the lives of each individual employee.

If we're not constantly challenging clients and asking ourselves "what can we do better?" then we're doing it wrong.

We rise to any challenge

We run towards problems, not away from them.

Our clients can rely on us and we are committed to doing everything we can to help; working as one team to exceed their expectations. Individually we are experts in our fields; together we are leaders in the industry.

We expect everyone to step up and own their part of a project. It's kind of like playing rugby; when someone passes you the ball, you're in charge of what to do with it next.

We learn at every opportunity

We are always looking to learn and develop. We know that to stay ahead we have to think ahead, so we push our own boundaries and continually 'wow' our clients.

Take every opportunity to learn something new and expand your mind. You're surrounded by smart people. Talk to them. Learn from their expertise. And don't forget to share your knowledge too.

We care about what we do

We don't accept the mundane. We always push the boundaries to create the best.

If you make something that doesn't look good or isn't usable, we'll chat with you about where we can improve. Don't worry, it's never negative or judgmental, we do it because it helps us get better and provide our clients with the service and results we pride ourselves on.

And that love we show for clients? We show it for one another, too. No person is an island—everyone's goals are shared goals. No one is above (or below) any task. And we never have to be asked for help, we offer it.

Let's talk about EX.

You will hear the phrase Employee Experience a lot around here, but what does it actually mean? Well...

For a long time, companies only cared about engagement, wondering why their employees weren't engaging in their communications or channels. But really, employees weren't engaging because their whole experience wasn't a good one.

People need to feel supported, encouraged, welcomed and valued. They need to feel... something—anything except confusion, exclusion, irrelevance and frustration.

As communicators, we sit in a privileged position to link the wants and needs of the people to the end goals of the organization, and vice versa. We've got an emotional connection to both the people and the business.

We've got an opportunity to influence the people experience; to create a space for cultures to develop, a platform from which leaders can lead, and a mouthpiece through which employees can hold those leaders to account.

We're ready to create the best employee experiences through our EX touchpoints.



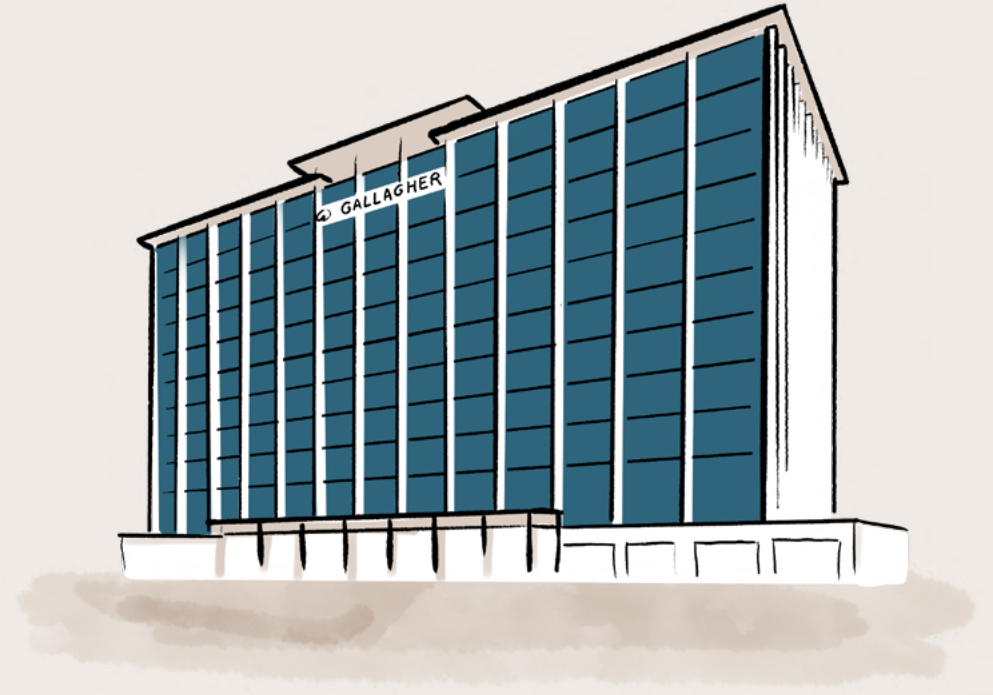
But what about BIG Gallagher?

So, what is AJG and how does the Communication Practice fit in?

Arthur J. Gallagher & Co. (AJG)—Gallagher for short—first opened its doors in Chicago in 1927, growing from a family business into one of the leading insurance, risk management and consulting services organizations in the world. There are three main branches of the company: Commercial Insurance & Risk Management, Benefits & Human Resources Consulting, and Reinsurance.

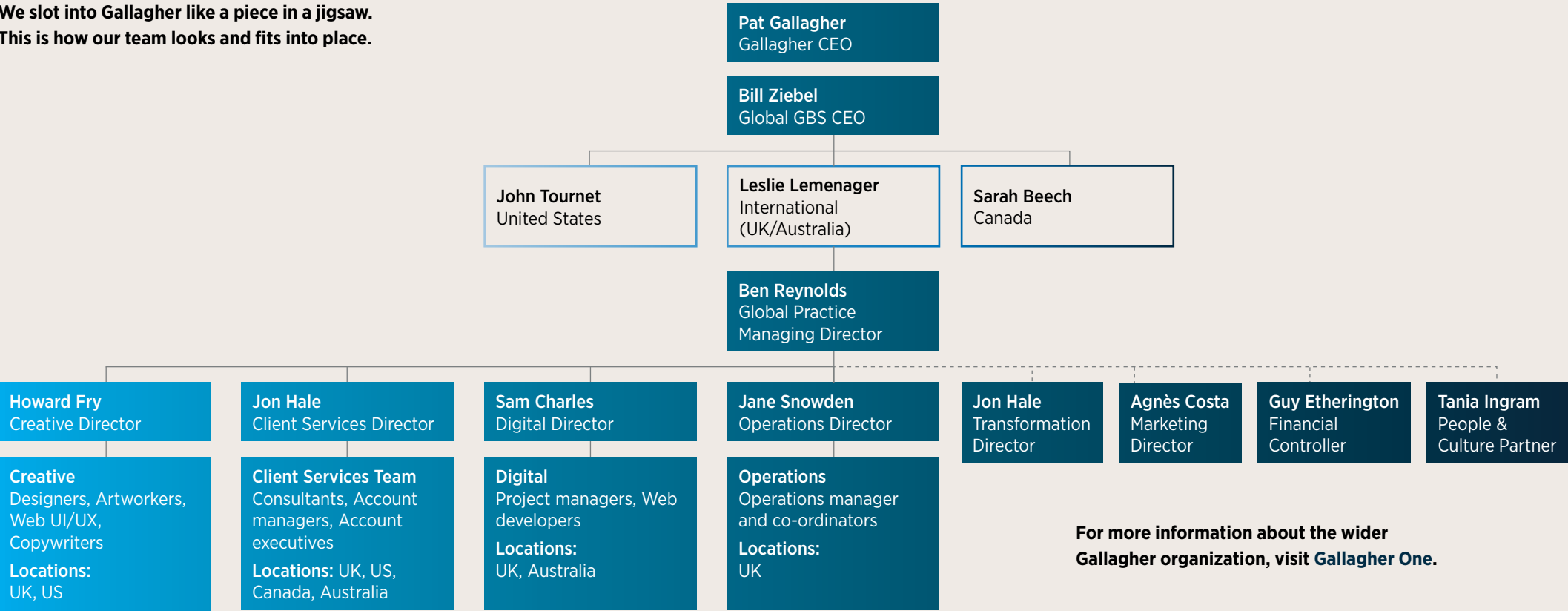
We used to sit within Benefits & HR Consulting, but as of 2022 we became our own practice, and we now sit as our own entity within Gallagher.

But no matter where we sit under the Gallagher umbrella, the goal is the same: to provide relevant and impactful professional advice utilizing our industry expertise to deliver the best solutions for our clients' needs.



The family.

We slot into Gallagher like a piece in a jigsaw.
This is how our team looks and fits into place.



For more information about the wider
Gallagher organization, visit [Gallagher One](#).

Let's get down to business

The magic / Client Services Team.

Welcome to the Communication Practice. The Client Services Team (CST) now numbers over 60 people from across the UK, US, Canada and Australia. All of us share the same vision of being the leading global employee experience partner, and we do this by providing outstanding communication solutions for our clients that help them to create organizations where people feel excited to join, engaged to perform and inspired to make a difference.

Whether you've joined as a member of CST, or one of our other industry-leading departments, we look forward to working with you. All our teams and departments collaborate closely and respect the immense value we bring collectively—we have a truly inspirational team! As you'll quickly find, what unites us is our passion for our work, our desire for our personal and organizational growth, and an understanding of and empathy for our clients and the challenges of their people.

Welcome aboard!



Jon Hale
Client Services Director



Pepper Krach
VP US Mid-Market



Jan Burnham
ROC Group



Siobhan Hammond
Head of Internal Communication



Sarah Jones
Head of Retirement Communication



Kayleigh Keogh
Senior Principal (North America)

The magic / Creative.

The Creative team may seem like a rather confusing mix of strategic brand consultancy, creative agency, and delivery studio. But we're glad it doesn't look like just another agency, because we're not. For us, above all else, it's a place where we can have a meaningful impact, produce work we're proud of—all while enjoying what we do—together.

We believe true innovation and creativity only happen when we create the optimal conditions for everyone to perform at their absolute best, an environment of diverse backgrounds, thoughts, views, opinions and life experiences.

And that's why you're here! There's no need to worry about 'fitting in'. You're here. You made it. You get it. All you have to do now is let your ideas and your passion do the talking.



Howard Fry
Creative Director



Nick Jones
Head of Creative



Craig Pearce
Creative Services Manager



The magic / Digital.

Hi! And welcome to the Communication Practice. Our Digital delivery team is made up of around 25 people based primarily in the UK but also in Australia. We love problem solving and are here to help our clients plug the gaps in their digital offering—we often do our best work when building solutions that others can't or won't.

Wherever you've joined the business, we're all part of the same team, and our developers have a wealth of experience in the industry and digital best practice that we hope you'll be able to contribute to, or benefit from.

We're really looking forward to meeting you and to working together.



Sam Charles
Digital Director



Chris Lewis
Principal Developer -
Secure Systems



Jim Wilson
Principal Consultant -
Digital Experience



Matt Dixon
Principal Developer -
Product



The magic / Operations.

Welcome to the Communication Practice! Whether you're joining CST, Creative, Digital, Finance or IT, we'll be working closely with you as our main responsibilities are to:

- manage resources across the production teams,
- manage relationships with our suppliers,
- maintain the ISO certification at our Liphook office, and
- provide management information reports using Synergist.

We also liaise with other central functions, like Facilities and Business Continuity in the UK, maintain and provide training on Synergist, and use Jira to manage resource requests across the Communication Practice.



Jane Snowden
Operations Director



Sarah Lewis
Operations Manager



Dianne Lumb
Senior Operations
Coordinator



Carol Dodds
Operations
Coordinator



The magic / Marketing.

A huge hello from the Marketing team—we're here to spread the word about the Communication Practice and share our amazing work with the world!

Want to find out more about what we do? Here are a few good places to start:

Online - We are the only Gallagher practice to have a dedicated (global) **website**. Take a look—and let us know what you think!

Social media - We use dedicated **LinkedIn** and **Twitter** accounts to grow our professional network and build our reputation. Give us a follow—and the odd share and like!

State of the Sector - Our flagship annual report on the hottest internal communication trends is the biggest and best in the world.

We also produce loads more content for our various audiences, and promote our thought leadership and insights via webinars, industry events and newsletters.



Agnes Costa
Marketing Director



The magic / Sales.

Passion. Enthusiasm. Ambition.

Welcome, from your Sales team.

We have a great record of winning new business and we are ambitious to grow the Communication Practice further by winning even more.

We have already got some great clients but we want more of them. That's what the Sales team gets out of bed each day to do—to bring you great clients to work with whatever your role is within the Communication Practice.

How do we do it? We use the great work we do for clients to help us win even more great clients. Full of enthusiasm and passion for communication, we're not just any sales team, we are the Communication Practice Sales team.



Karen Bolan
UK Retirement



Gary Moss
UK IC



Chris Lee
Canada



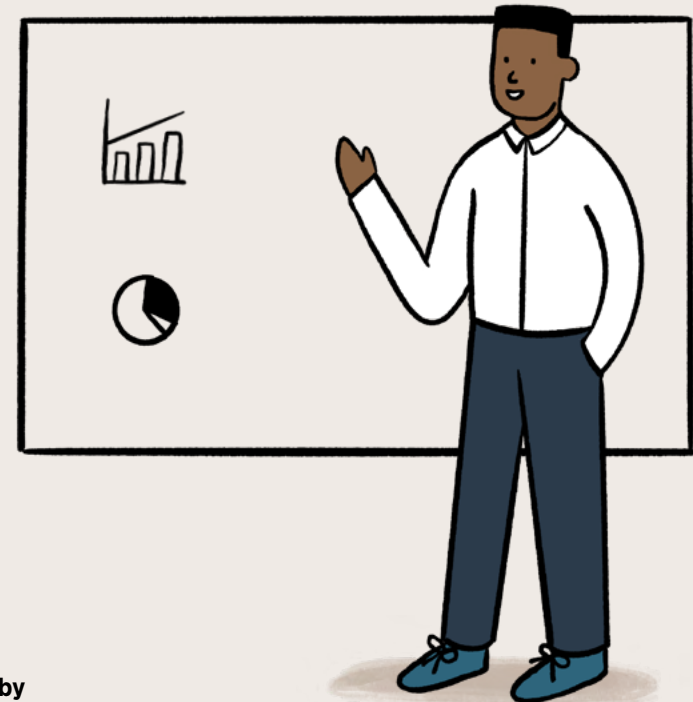
Rhys Davis
United States



Dan DiSciullo
United States



Maddison Grigsby
United States



Other useful bits and bobs.

Your tools.

Synergist

If you're joining the Digital or Creative teams, Ops will train you to use Synergist for two things:

Checking what work is booked to you

In Scheduling > My Calendar you'll find all the work that's booked to you for the day, week or month.

Logging your time at the end of each day

We log our time so we know how much we need to charge our clients for the work we do. You'll be assigned a discounted hourly rate when you first join us as we know it takes a while to pick up speed. Go to Time & Expenses and choose either the Weekly timesheets or Daily timesheets option.

Traveling

For information about our Travel policy and how to book hotels through Egencia, visit **Gallagher One**.

To claim your expenses, you will need to use **Concur**.

eLearn

Explore more than 2,000 web-based business skills courses **here**.

Office templates

You can find our PowerPoint template at **\GBS UK\Communications\Office Templates\GC-0001 Internal\GC-0001 PowerPoint template** and our Word template at **\GBS UK\Communications\Office Templates\GC-0001 Internal\GC-0001 Word Template**

IDM

IDM, or Identity Management, is the portal we use to gain access to Gallagher-wide systems and resources. So, if you need a new keyboard, access to a client data folder or a subscription to new software, IDM is the place to go.

Access IDM through the IT Self Service site, or directly through the **GBS intranet**.

You can only access this link while you're on the AJG network.

myHR

myHR is the portal we use to centrally log information about our employment, training and performance.

We can also update our personal details, contact information and add our emergency contacts, as well as viewing our payslips and benefits here.

Access myHR through the **GBS intranet**.

You can only access this link while you're on the AJG network.

How we communicate with you.

You will receive communications from us as a practice, but also from the Gallagher Benefit Services (GBS) division and, occasionally, from Gallagher.

Practice

- Monthly newsletter
- Weekly team meetings
- Quarterly all-team updates
- Microsoft Teams

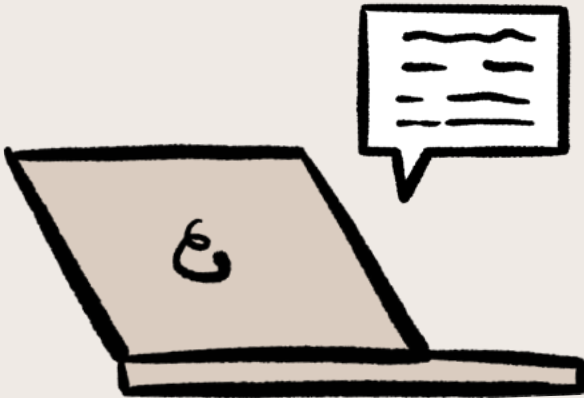
GBS

Depending on where you sit in the world, you might be invited to GBS-led events and receive communications from your division.

Business objectives

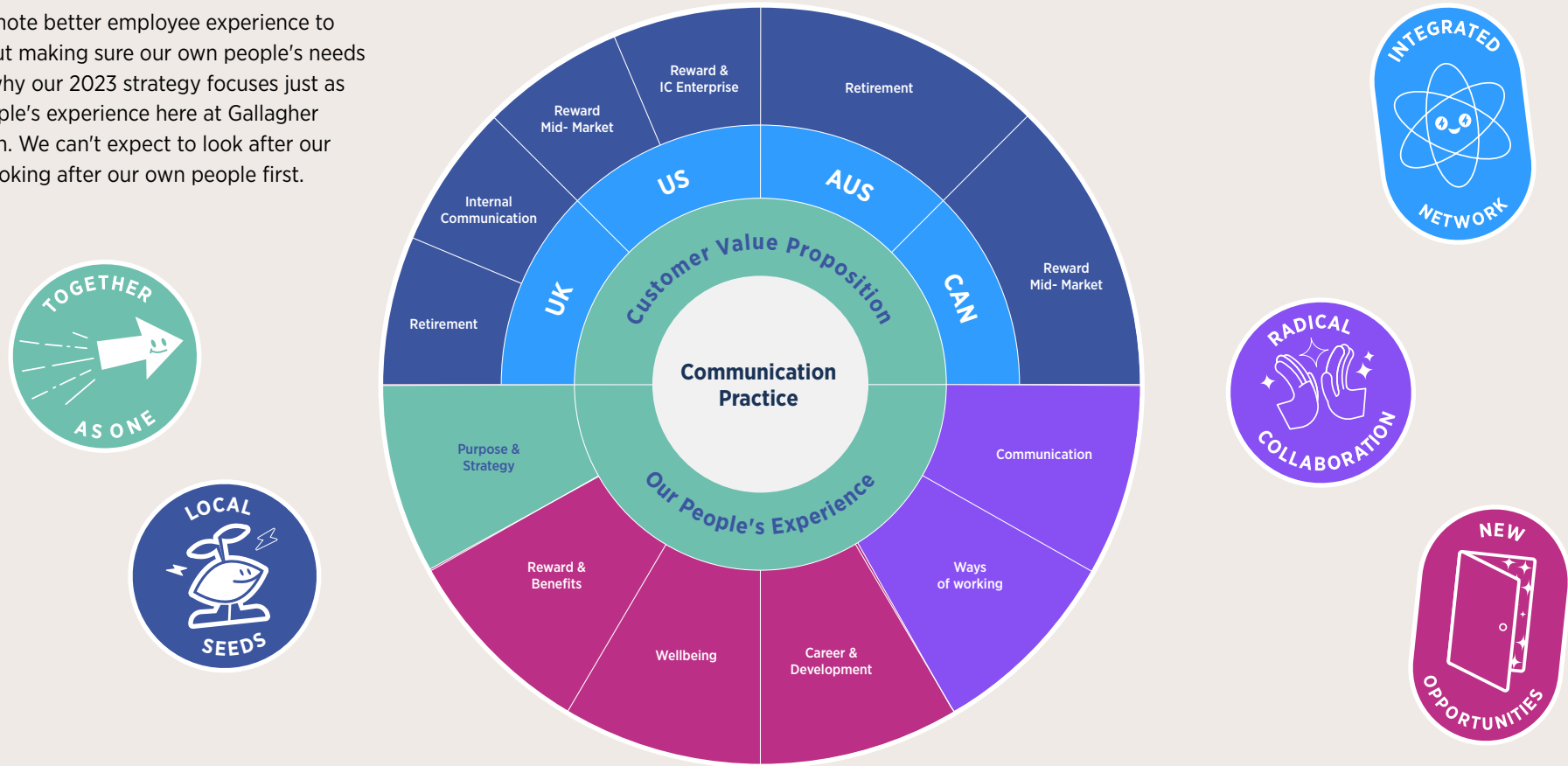
You will also occasionally receive email announcements from Pat Gallagher (e.g. Quarterly financial results), Bill Ziebel (e.g. global GBS announcements) and Tom Tropp (Corporate Social Responsibility).

Gallagher One is also a source of information about Gallagher processes, news and divisions.



Our 2023 strategy.

How can we promote better employee experience to our clients without making sure our own people's needs are met? That's why our 2023 strategy focuses just as much on our people's experience here at Gallagher as our proposition. We can't expect to look after our clients without looking after our own people first.



Our 2023 drivers.



**TOGETHER,
AS ONE**

(Define our proposition)

Our unified purpose, values, standards and rituals.

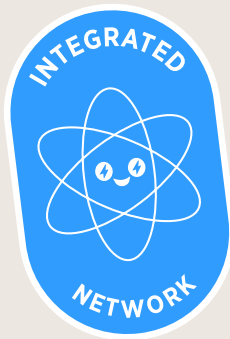
Increase market visibility by developing a clear value proposition in the Employee/ People experience, Reward and Retirement global markets, across Enterprise, mid and emerging markets.



**LOCAL
SEEDS**

(Country-specific business plans)

Develop country-specific growth plans, aligned to localized market challenges and GBS strategies.



**INTEGRATED
NETWORK**

(Global structure and talent investment)

A place where strong relationships are formed and teams effortlessly gather around the need of each communication challenge.

Rebuild structure of our communication practice, acquiring new talent, to support developing proposition and drive both organic and practice growth.



**RADICAL
COLLABORATION**

(Efficiencies and margins)

Improve ways of working across our global practice to improve our efficiency; coupled with creating clarity and improving target operating models for both high-end consultancy and more scalable repeating products.

Embrace a globalized workforce and remote working by improving our ways of working.



**NEW
OPPORTUNITIES**

(Compelling Purpose and Culture)

Link individual objectives and performance to the overall business strategy and plan to drive individual recognition

Investing in our culture so our people can be their best, everyday.

Let's get started!

So, now you know how we do things here at Gallagher, it's time for you to meet the rest of your team and add your value.

We're thrilled to have you here and to see what you'll accomplish during your time with us. We can't wait to see how you'll grow—and the ways in which you'll help us to grow individually, as a team, and as a company.

At Gallagher, we always say we're a big company but we work like we're a small firm. That's because we're driven by the relationships we have with our clients. We take the time to get to know them and use our expertise to develop the right solutions for them.

You're on that journey with us now. And we're just getting started!

Have we missed anything? Please speak to your line manager if you have any questions or there is something else you need to know about.