

HR MANDATE



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Welcome to iA!

THE CORPORATION

iA Financial Group (iA) is one of the largest insurance and wealth management groups in Canada.¹ Founded in 1892, the company has been around for over 127 years and is one of the country's largest public companies. iA is a distribution network of more than 25,000 representatives and advisors, more than 5,000 employees, more than 4 million clients and more than \$100 billion in assets under management and administration in Canada and the United States.

The insurance and financial security industry has seen substantial expansion in recent years, in particular as a result of an aging population, growing interest in the future and financial security, an increase in the number of retirements, as well as an increase in the risks associated with natural events (e.g. flooding).² Demand is increasing, competition is getting stiffer and technology brings with it new challenges and forces organizations to adapt. As a result, the need for qualified personnel also continues to grow.³

In order to meet these new challenges, Industrial Alliance and its subsidiaries adopted a new brand image – iA – in 2015 that reflects the Group's scope and the broad diversity of its products. On January 1, 2019, the company became iA Financial Corporation Inc., a portfolio management company. This is a public company, and no person may hold more than 10% of its voting shares. This new corporate structure aims to provide the Group with more flexibility in order to implement its growth strategy and better meet the ambitions and changing needs in the organization of financial services.

¹ iA Financial Group website: <https://ia.ca/about-us>

² Portrait de l'industrie de l'assurance et de la sécurité financière (available in French only): <https://www.metiers-quebec.org/portraits/administration5.htm>

³ Ibid.

iA offers a broad range of products and services for individuals, groups and companies. The Group's main business segments are individual insurance, individual wealth management, group insurance, savings and retirement, dealer services and auto and home insurance. A simplified organization chart is presented in Appendix 1.

iA's mission is to ensure the financial well-being of its clients by providing them with personal protections and investment solutions that will help them achieve their life goals. iA's ambition is to be the company that best meets the expectations of its clients, in partnership with its distributors. Specifically, with regard to its employees, iA wishes to become a sought-after employer for people looking for a stimulating career. iA's success is the fruit of an entrepreneurial culture and an unwavering desire to maintain relationships of trust with its clients, distributors, employees and shareholders. This success is based on values the Group makes every effort to promote with anyone who gravitates around the organization.

iA's five values

Teamwork

- Showing flexibility to maintain a balance between one's own goals and those of the organization.
- Exercising a positive influence on one's team.

Service-Oriented

- Being proactive in determining the needs of clients and partners.
- Guiding one's actions on the basis of the end client.

High-Performance Environment

- Respecting quality standards while remaining efficient.
- Being responsible in doing one's work and in developing one's procedures.

Continuous Improvement

- Challenging procedures.
- Identifying continuous improvement opportunities regarding team processes, and taking initiatives to seize such opportunities.

Respect for Individuals and Distributors

- Considering the opinions, needs and expectations of the various stakeholders in all actions and decisions, without prejudice.
- Treating one's partners and clients with consideration, diplomacy and humility.

These five values, in combination with Lean tools, illustrate iA's desire to become a learning organization through continuous improvement. Inspired by its values, the company supports the community, in particular by giving out more than \$3 million to several hundred organizations every year.

Since 2015, iA has undergone significant changes. Restructuring has been extensive, and at many corporate levels. As a result of this reorganization, four pillars have been identified to support iA's long-term success:



The pillar of greatest interest to us is that of "employee experience." It is inspired by iA's ambition and desire to develop the company's culture. The purpose of employee experience is to ensure the long-term success of the organization, as well as to attract and retain talented employees. Recent changes have affected this pillar, such as the arrival of a new CEO and the creation of a Client and Employee Experience Vice-Presidency. This new Vice-Presidency brings together all human resources management employees, including a team of 30 talent acquisition specialists. Most of the team's members are located in Québec City, but some members work in Montréal, Toronto and Vancouver (see Appendix 2). Most of iA's employee recruitment takes place in these cities.

The mission of the **Talent Acquisition Team** is to provide proactive, mobile and consistent strategic support to its business partners. The use of recent technology and the creation of a single national talent acquisition team are two means by which this mission can be achieved. It is essential that potential employees have a positive candidate experience during the recruitment process, and that they all have the best possible employee experience when they use the various assistance services offered to them as soon as they are hired.

For the best employee experience, iA provides a human approach, numerous career and professional development opportunities, as well as high-quality working conditions. The Talent Acquisition Team works with the organization's various stakeholders and advises

them as to the choice of candidates to ensure the best talent is hired. In order to achieve this, iA relies on a unique candidate experience.

ISSUE

With regard to employee experience, a review of the onboarding and integration process has been undertaken. iA's Talent Acquisition Team is calling upon you to help them improve the current onboarding process. As part of their continuous improvement efforts, the Talent Acquisition Team constantly enhances the services it provides to all of its partners. Improving the onboarding process is one of its current priorities given its significant influence on the employee retention rate.

Here is an overview of the current employee onboarding process at iA:

Step 1: The employee signs a contract.

Step 2: The recruiter sends out the "Welcome to iA" email (see Appendix 3).

Step 3: The employee provides certain information (e.g. person to contact in case of an emergency; choice of group insurance; choice of federal source deductions), and fills out the documents required on the Workday⁴ digital platform. The employee can also contact the HR Customer Service department if need be.

Step 4: During the employee's first day at work, starting at 8:30 a.m., an HR representative greets him or her in the lobby. If more than one employee starts work on the same day, they are all greeted together.

Step 5: A welcome kit is given to the employee. The kit includes a welcome letter from the CEO; information on iA's values and mission; explanations concerning the insurance plan; a pen; a tumbler with straw; and an iA pin.

⁴ Workday is an HR management software application. For more information, go to the Workday website at www.workday.com.

Step 6: The employee attends a short welcome presentation of less than 10 minutes (see Appendix 4). Students, interns or temporary employees attend a shortened presentation that does not include information about employee benefits, as they do not qualify for them. Permanent employees have different conditions, hence the need to provide them with additional information.

Step 7: The HR representative accompanies the employee to the Material Resources office to have his or her picture taken and access card produced. The HR representative then calls the employee's manager to come and meet him or her in the lobby.

Step 8: The employee is taken back to the lobby.

Step 9: The employee waits for his or her manager in the lobby.

Step 10: At some point during the day, the HR representative sends a generic email to the employee, which contains a summary of the information presented in the short welcome presentation.

Approximately 1,600 new employees were hired by iA in 2018, including students and interns, which meant new employees arriving nearly every week at the four major offices in Canada. Welcome meetings are therefore held every Monday almost without exception. The number of new employees welcomed every week varies from week to week, depending on the time of year, and the numbers can sometimes be as high as 35 employees.

The steps described above are the only actions currently taken by the Talent Acquisition Team with regard to employee onboarding. After the generic email is sent out (Step 10), the employee's manager takes over the integration duties. If the employee has any questions concerning human resources, he or she is referred to the company's intranet

or asked to call HR Customer Service. The Talent Acquisition Team does not currently conduct any follow-up, as this would overwhelm the team given the high number of new employees.

In 2017, a committee was created to review the onboarding and integration process. Interviews were conducted with managers, those in charge of talent acquisition and employees to gauge their perceptions and assessment of the onboarding process. For example, the committee tried to find out what the employees would have wanted to know when they started at the company and what they found to be the most useful.

With regard to employees, the main observations were the following:

- The people around them, whether direct or indirect colleagues or the manager, have a major positive effect on a new employee's integration.
- The new employees felt they were left on their own, as the integration process is not sufficiently structured, and some even feel it is non-existent.
- The purpose of the Monday morning meeting with human resources is poorly communicated. New employees find it too short and too generic. The timing of this meeting is also called into question.
- Information about the company and its organization chart, its products and services and even the new employees' business segment is poorly understood, as it is not communicated to them.

To collect employee opinions about the onboarding process, there is only one survey (see Appendix 5) that is sent three months after hiring. The response rate is approximately 47%. As the survey is confidential, personalized follow-up cannot be provided to employees who share their concerns or dissatisfaction. Here is a summary of the results collected in recent months:

Most appreciated points:

- Warm welcome by the team and the human qualities of colleagues
- Mutual assistance among colleagues
- Guidance and help from the manager
- Presence of a manager to sponsor a new employee
- Various training opportunities, conferences and activities
- Guided tour of the workplace and introductions to colleagues
- Welcome meeting led by human resources

Least appreciated points:

- Computer delays
- Incomplete welcome by human resources (too short)
- Lack of accompaniment (left on their own)
- Lack of information
- Difficulty understanding employee benefits
- Lack of onboarding structure

Improvement priorities:

- Providing more information on the job before the first day at work
- Improving Workday support tools
- Improving communication with new employees before their arrival

- Improving the content of the HR welcome meeting
- Providing more information about iA
- Providing better information to employees about their benefits
- Conducting a tour of the workplace
- Improving follow-up by human resources in the weeks or months that follow the hiring date

SPECIFIC CONTEXT OF iA

Before going any further, it is important to understand iA's situation. It is a large Canadian corporation whose head office is located in the heart of the city of Québec, the province's insurance capital. All important communications are bilingual (French and English). Given that some teams have members in different Canadian provinces (e.g. the Talent Acquisition Team), communication and standardization of processes are major issues.

The Talent Acquisition Team focuses its activities on **iA employees**, namely those who hold positions with the company. The employment categories in which the highest numbers of employees are found at iA are:

- | | |
|---|---------------------------|
| • Actuarial Science | • Human Resources |
| • Administration – IT | • Administrative Services |
| • Corporate Affairs and Communications | • Client Service |
| • Insurance Business Development – Intermediary Sales Channel | • Dealer Services – Sales |
| • IT Development | |
| • Finance and Accounting | |
| • Students | |
| • Marketing | |

The many financial advisors who represent iA across the country are self-employed individuals who work at agencies and are not considered iA employees. It is therefore not the Talent Acquisition Team that handles their recruitment, but rather the agency managers. Each of the 52 agencies in Québec is managed by a director. There are also 60 agencies in all of the major cities in Canada, as well as the United States. The agency directors are responsible for recruiting, onboarding, developing and training the members of their teams of financial advisors. They can request support from iA's Human Resources Department if need be, but they generally carry out their operations quite independently.

As part of your mandate, you will be focusing on the new iA employees who work at the head office and the main offices in Toronto, Montréal and Vancouver, and not the financial advisors or their directors. Since the iA employees work at several different locations in each of the four cities, you must consider, in your recommendations, the logistics required for employees who must travel to meet HR personnel.

YOUR MANDATE

Onboarding and integration of new employees bring together a set of strategic activities that have a direct impact on workplace productivity and motivation, as well as developing loyalty among new employees. As part of your mandate, you must focus mainly on **onboarding preparation** (before employees start working) and employee **onboarding**, until approximately the second week of employment. Employee integration does not need to be addressed, as this component is dealt with by the employee's manager and colleagues.

Your mandate, as a human resources consultant, is to evaluate the current onboarding process for new employees at iA in order to draft recommendations that will make the employees' first days more enjoyable, instructive and stimulating. You must then develop a process that will maximize engagement among new iA employees, right from the very moment they accept their job offer.

Your strategy will be presented to the Talent Acquisition Team that is currently responsible for accompanying newly-hired employees until they start their new jobs.

Avenues for potential solutions:

- How can the welcome meeting be improved and have a greater impact?
- What information should be prioritized and when should it be delivered?
- How and when should follow-up be provided?
- How should the process be evaluated?
- What innovations should be put forward?
- Who should be in charge of onboarding?

It should be possible to standardize the recommendations and apply them to all new employees in Canada in the Québec City, Montréal, Toronto and Vancouver offices. The ultimate goal of your strategy must be the retention and loyalty of new employees at iA.

Your presentation must include an analysis of the situation, including your main observations and issues raised, as well as a strategy that proposes short- and long-term solutions.

Your budget for this improvement project is unlimited. The company is searching for innovative solutions, which are outside the box, and which involve its current

employees. You are asked to use **creativity**, while being realistic, and adapt to the company's situation. It goes without saying that the proposed solutions must align with the company's culture and values.

Good luck!

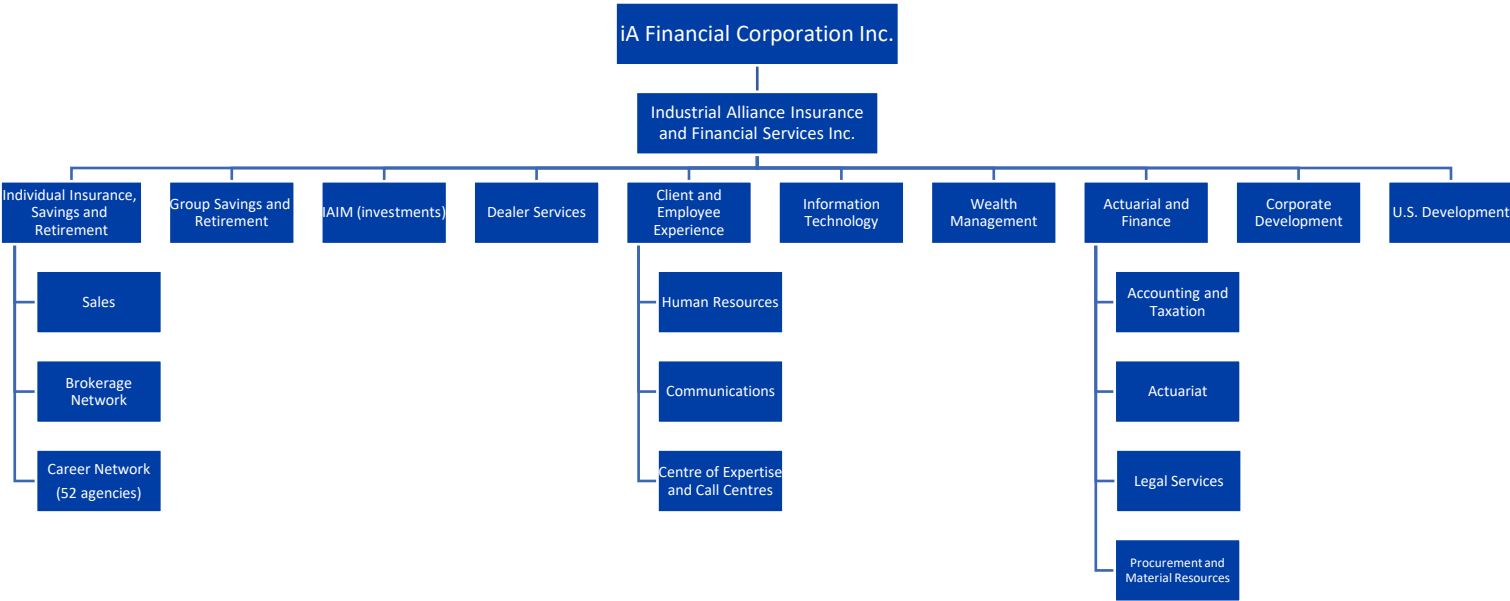
Mediagraphy

iA Financial Group website (2019): <https://ia.ca/about-us>. Viewed at: <https://ia.ca/a-propos>

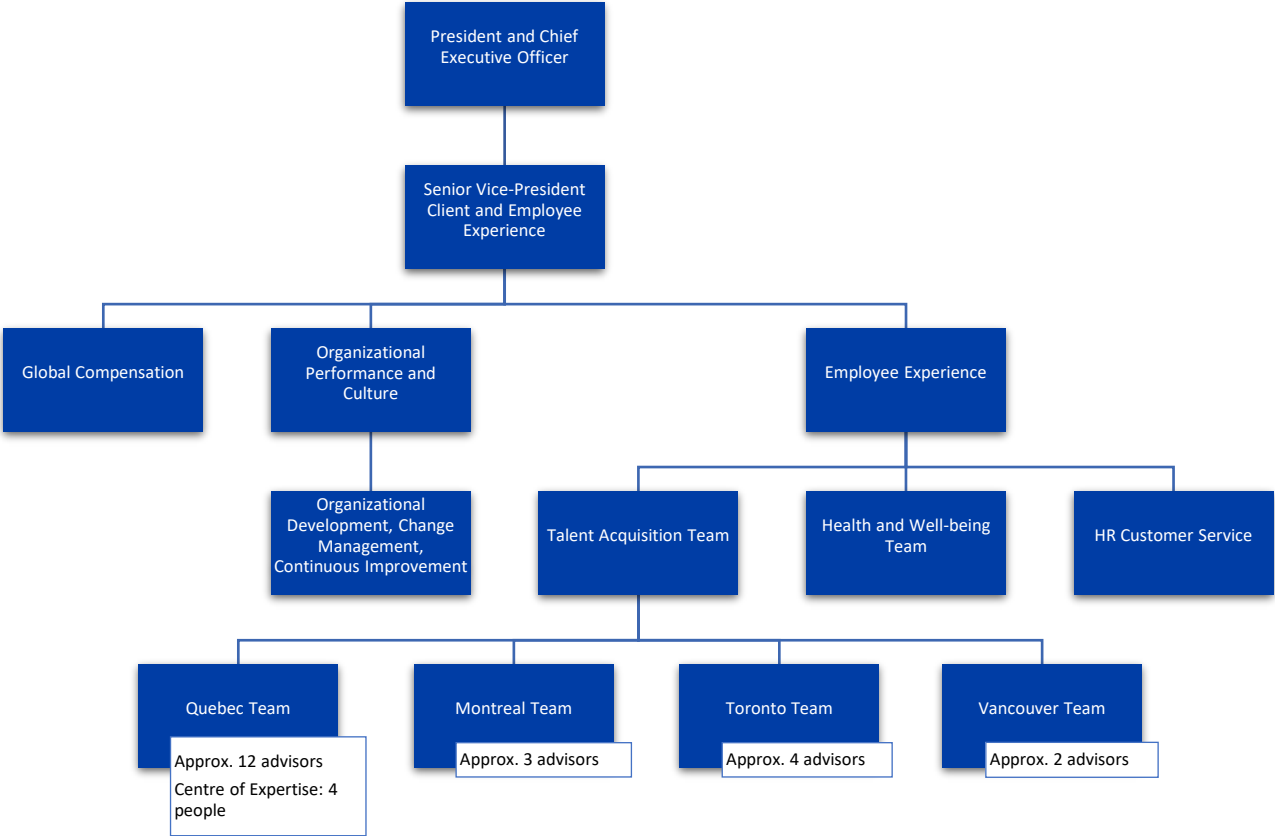
Métiers Québec (2015). *Portrait de l'industrie de l'assurance et de la sécurité financière*. Viewed at: <https://www.metiers-quebec.org/portraits/administration5.htm>

APPENDIX

Appendix 1 – Simplified organization chart for iA and its subsidiaries



Appendix 2 — Organization chart for the Talent Acquisition Team



Appendix 3 - Welcome to iA email



Welcome to iA



Human Resources

Dear [First name] [Last name],

Congratulations! Following our conversation and acceptance of your offer, we are pleased to have you with us.

Onboarding

We will be happy to welcome you on [date] at 8:30 am at [office address]. If you travel by bus, ... [information regarding public transport].

Parking

[information regarding parking]

Employee file: Here are the steps to complete in Workday before you start working.

1. **Log in to Workday**
 - Website: XXX
 - Username: XXX
 - Password: XXX
2. **Install the authentication software on your personal computer.**
3. **Complete the steps on your Workday profile.**



Onboarding
steps

Group insurance: [information regarding group insurance]

4. **Your employee ID number is XXX.**

IMPORTANT: All onboarding steps must be completed before your first day of work to ensure the proper processing of your pay and to avoid delays in the delivery of your first pay.

You have questions related to the onboarding steps and/or the group insurance plan? Call the Human Resources Department at X XXX XXX-XXXX.

We welcome you to your future team. Challenging professional and personal experiences await you.

Sincerely,

Appendix 4 - Content of the current PowerPoint presentation

(Permanent employees - Quebec City offices)



Welcome
to iA!

Slide 1: Welcome to iA!

- The HR representative introduces himself/herself.



Your access card

Mandatory at all times

In case of loss : \$\$

Main uses :

- ✓ Access to buildings
- ✓ Cafeteria
- ✓ Gym

Slide 2: Your Access Card

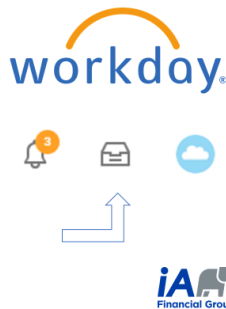
- Information about how to use the access card.

Onboarding

Steps required for first pay :

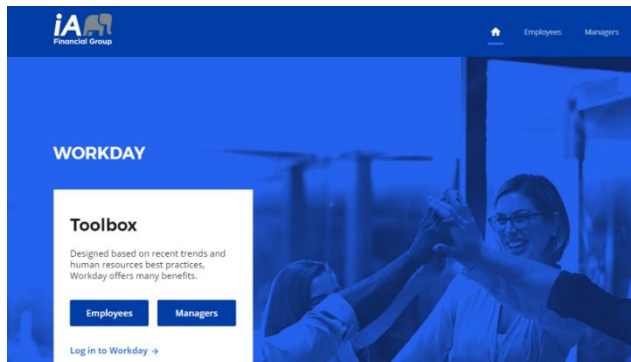
- ✓ Personal Information
- ✓ Government Identifiers
- ✓ Withholding taxes
- ✓ Specimen cheque

All tasks are in your inbox.



Slide 3: Workday

- Brief reminder of the important steps in Workday employees must take to receive their first pay.



Slide 4: Workday Toolbox

- Reminder that a toolbox is available on the Workday platform (capsules, FAQs, guides, etc.).

Time and Absence

Time



Permanent and temporary employees:

- ✓ Real-time payroll
- ✓ No time entry required (except for overtime)

Students, Interns, Casuals

- ✓ Enter the hours by clicking on the "Hours" icon.
- ✓ It is very important to always submit for approval.

Absence



Permanent and temporary employees:

- ✓ To enter absences (flexible leave, vacation)

Students, Interns, Casuals

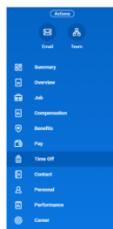
- ✓ To enter unpaid absences



Slide 5: Time and Absence

- A brief explanation of the procedure for tracking hours and absences.

Absence plan



Absence Plan	
Unit of Time	Hours
Time Bank	Hours
1	

The reference year for holidays is from May 1 to April 30.

Accumulated vacations:

Accumulate throughout the reference year

Earned vacations:

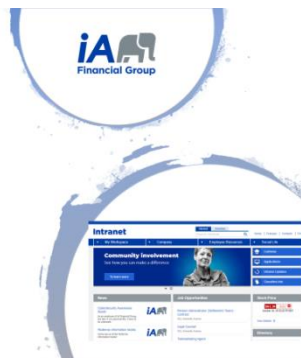
On May 1st, the accumulated vacation is transformed into earned vacation. The available balance

Slide 6: Absence Plan

- More information about vacations.

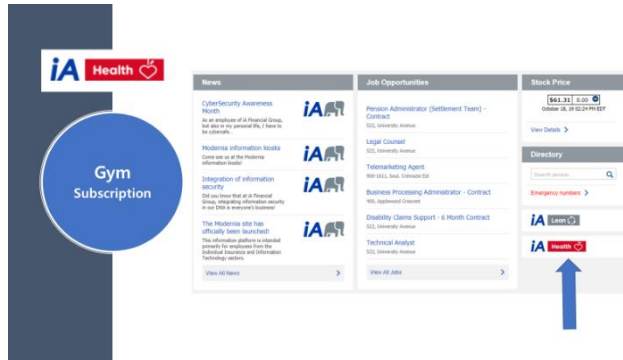
Intranet

- ✓ Company News
- ✓ Cafeteria Menu
- ✓ Gym registration (iA Health)
- ✓ Corporate discounts
- ✓ Job opportunities
- ✓ Referral program
- ✓ Classified ads
- ✓ Explanatory brochures



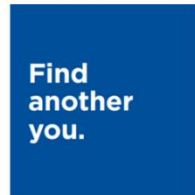
Slide 7: Intranet

- List of some of the elements available on the intranet.



Slide 8: Gym Registration

- Explanation of the free gym registration procedure.



Referral bonus when a candidate you refer is hired!

Program conditions available on the Intranet.

Slide 9: Reference Program

- Reminder to encourage employees to refer their relatives who are potential candidates.

Important numbers



0000 : Human resources

- ✓ Employee benefits
- ✓ Payroll

0000 : Computer support

- ✓ Password problems
- ✓ Connection
- ✓ Access

0000 : Material resources

- ✓ Parking lot
- ✓ Ergonomics
- ✓ Rental of rooms



Slide 10: Important Numbers

- List of important telephone numbers (human resources, material resources, IT support)

Appendix 5 – Survey questions given to employees 3 months after arrival

1. What province do you work in?

- ☐ Alberta
- ☐ British Columbia
- ☐ Manitoba
- ☐ New Brunswick
- ☐ Newfoundland and Labrador
- ☐ Nova Scotia
- ☐ Ontario
- ☐ Prince Edward Island
- ☐ Quebec
- ☐ Saskatchewan

2. It was easy to make it to work the first day based on the instructions I received in advance.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

3. My computer access was working on the first day.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

4. When I arrived, I was paired up with a colleague to support me and help me feel like part of the team.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

5. I got the information I needed during my meeting with Human Resources.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

6. My immediate work team gave me a warm welcome, and were respectful and willing to help.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree

- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

7. My immediate supervisor clearly explained to me my role and responsibilities.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

8. My immediate supervisor gave me feedback on the way I was working and my performance.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

9. The information I received about iA Financial Group (history, values, products and services, etc.) gave me a good overview of the company.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

10. My immediate supervisor explained iA's official performance appraisal process to me.

- ☐ Completely disagree
- ☐ Strongly disagree
- ☐ Somewhat disagree
- ☐ Neither agree nor disagree
- ☐ Somewhat agree
- ☐ Strongly agree
- ☐ Completely agree

11. What did you like most about your onboarding experience? Why?

12. What did you like least about your onboarding experience? Why?

13. Do you have any suggestions or comments to improve the onboarding process?

14. What was your overall impression of your onboarding experience?

- ☐ Completely dissatisfied
- ☐ Somewhat dissatisfied
- ☐ Somewhat satisfied
- ☐ Very satisfied