



Name of your organization: Ivari

How do you use the People Insights Platform today?

We are longtime clients. We first signed our contract with Waggl in 2016. We began using the Employee Voice in 2018 and have used the same questions to measure our engagement and build shared ownership of our success. Over the years, the People Insights Platform has been a critical tool for ivari's senior management team, HR and communication leaders. The data from the platform drives our overarching employee experience strategy, our performance management communications, our change-management approach, and our diversity, equity and inclusion journey. In addition, the tool allowed us to frequently gain employee insights during the COVID pandemic and a corporate acquisition.

The Employee Voice provides us with meaningful employee engagement data, but also helps move the needle on low scores through action planning.

Please share your EX Impact story. Detail your challenge, solution, and impact.

I have submitted EX impact stories for manager effectiveness, DEIB and Transformation & Change. They are all listed below.

Manager effectiveness:

HR leaders had concerns that managers were not meeting regularly with their employees to give actionable, tangible performance feedback. We wanted to gauge the effectiveness of both our managers in communicating our corporate objectives to their employees and our performance corporate communications. We ran two pulses, one for employees and one for people managers. The People Insights platform was a critical partner in uncovering the location of the disconnect by allowing us to drilldown and see what department leaders were not meeting with their teams regularly. HR and senior leaders worked with those managers to provide guidance in sharing more meaningful, tangible action plans around corporate objectives and how they tie back to a day-to-day job. These pulses also helped drive the content for two internal leadership programs for people managers and succession candidates run by our Learning & Development team. These leadership programs are now a significant investment in development of our people leaders.

DEIB:

Like many organizations in 2020, we were keen to crystalize what DEI meant to the culture at ivari. At the time, we prided ourselves on being a diverse, inclusive and welcoming organization. However, we didn't have the formal mechanisms in place to test the effectiveness of these convictions. Senior leadership were steadfast in their desire to ensure our employees brought their authentic selves to work without fear of discrimination. We turned to the People Insights platform to help us develop a question set to measure areas of importance. Employees were invited to tell us if they felt opportunities for professional success were offered to all employees regardless gender identity or background. We also wanted to know if employees felt safe speaking up if they observed language or behaviours that were not in line with our corporate



DEI culture. The data gave us a great place to start the important action planning. As a results of these annual pulses, we have:

Created a learning curriculum and provided 7 required educational training sessions to employees

Refreshed job posting templates to be more inclusive of people of all abilities and demographics (we challenged criteria like post-secondary education and Canadian work experience)

Created a 'Hiring Toolkit' for Managers to assist with equitable job creation, screening candidates, and interviewing candidates

Created an annual calendar for occasions with particular significance to members of the major faith and cultural communities

Established succession planning initiatives to ensure current employees have the skillsets today, and in years to come

Ensured a more diverse selection of candidates from the recruiting agencies we use to acquire senior talent – our new approach involves ensuring more candidates compete for a posted role than in past years.

Partnered with an external vendor to provide a confidential reporting line for employees to share ivari Code of Conduct violations

We went through a process to track the diversity of applicants and confirmed we are attracting a diverse pool of candidates.

We were also able to demonstrate that the diversity of employees at ivari was reflective of the demographics in the city where we operate.

Transformation & Change:

In the last four years, our company has undergone significant changes. In addition to transitioning from fully remote back to a hybrid workforce, we underwent an acquisition and a third-party operational outsource. In 2021 half of our employees were rebadged, and our legacy technology underwent a significant overhaul. In 2022, we were purchased by a Caribbean insurer looking to enter the Canadian market. The opportunity for our business has been largely positive, as our values around our customers and employees align well. The acquisition did not come with a headcount reduction. Despite the positive aspects of the sale, HR and senior leaders were up against change fatigue in our workforce given the events of the previous years. After both the outsource and acquisition announcements, we used the People Insights platform to gauge how to help employees move through the changes and what questions they had. The pulse allowed us to drill down and understand which departments were struggling and which were functioning well. As a result of those pulses, HR and senior leaders collaborated on the following initiatives:



Structured, frequent Management townhalls led by the CEO and other senior leaders

CEO communication strategy

Senior leadership/Executive communication strategy

Two internal leadership programs for people managers and succession candidates