

## Peopleclick Authoria Case Study: Sun Life Financial

### Sun Life Financial at a Glance

INDUSTRY: Financial services

HEADQUARTERS:  
Toronto, Ontario

EMPLOYEES: 14,000 worldwide

#### GOALS:

- Expand and improve succession management across a global, highly-decentralized enterprise
- Replace manual processes to gain efficiencies
- Fill positions and identify successors more quickly and efficiently

#### SOLUTION:

Peopleclick Authoria  
Development & Succession

#### RESULTS:

- Ability to identify candidates quickly
- Consistent view of skills and competencies worldwide
- More efficient processes
- Ability to consolidate data and analyze trends
- Implementation recognized with CEO Award of Excellence

The search for talented leaders has become a top priority for businesses worldwide. Until the late 1990s, employers tended to look outside their organizations for fresh executive talent, and it was common for those looking to advance their careers to jump to a new company. All that has changed in the post-2000 era, as companies increasingly seek to cultivate leaders internally.

Fueling this trend is the realization that half of today's senior business leaders are within a decade of retirement, and companies urgently need to start finding and shaping executive talent to fill the looming leadership gap. By developing their own people, employers gain the advantages of having leadership candidates who know the business and have proven records of success.

Sun Life Financial is an international company that has created formal programs to identify employees with leadership potential and groom them for senior-executive positions.

A leading financial services organization chartered in 1865, the Toronto-based company has an international workforce as diverse as its products and services, operating in key financial markets such as Canada, the U.S., the UK, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China and Bermuda.

For Sun Life, developing leaders from within is embedded in the company's core values: "We value our diverse, talented workforce and encourage, support, and reward them in contributing to the full extent of their potential." And the company is true to its word, as senior-level positions are regularly filled internally.

Sun Life demonstrates its belief in talent contribution through a comprehensive talent-review process. Annually, Sun Life asks leaders to assess talent within middle to senior management ranks and identify employees with executive potential. Senior executives meet to review the leadership talent pool, which includes successor nominations to critical roles and high-potential performers.

Development action plans are established and include:

- Experience (i.e. cross functional/international job rotations, special projects/assignments, stretch goals within current roles, etc.)
- Coaching/mentoring relationships
- Education-based development opportunities

To improve the organization's talent readiness, Sun Life monitors future leaders' development progress throughout the talent review cycle.

**“Peopleclick Authoria Development & Succession will ensure we always have a good view of our worldwide leadership talent.”**

— Cathryn Klassen, Vice President Leadership and Talent Development  
Sun Life Financial

Peopleclick Authoria Development & Succession automates the leadership-development process to help managers identify potential successors, monitor the talent pipeline, and track available candidates. The solution provides insight into the competencies for critical positions, enabling the organization to plan for growth.

Management has visibility into the skills, ambitions and mobility of existing talent and is able to track candidate availability against current and future business needs. When critical roles become open, strategic internal hires have already been identified in advance.

## Challenges

Sun Life’s highly-decentralized international organization of more than 14,000 employees worldwide made it difficult and complex to identify and nurture future leaders from within. Each operating unit used a different Human Resources Information System (HRIS). As a result, there was no consistent way to collect, review and share information about promising leadership talent.

When it came time to do the annual organization-wide talent review and create succession plans, the effort required to understand talent needs in-depth was monumental. Every country reported information differently, mostly through spreadsheets. There was no consistent way to share or house data, and the process of manually gathering and reporting information was tedious and time-consuming.

As a result, Sun Life was challenged to quickly identify internal candidates from around the company when leadership roles became vacant. Without a unified system to help management assess talent and identify talent gaps, the company’s leadership-development objectives would be at risk.

“With the right data, you can make good decisions,” explained Cathryn Klassen, vice president, leadership and talent development at Sun Life. “We were able to get the data, but the process was unnecessarily difficult, slow and constrained. We were manually harmonizing several sets of data, and identifying trends to help us more cohesively and consistently manage our talent took a long time.”

## Solution

To fulfill its leadership-development goals, Sun Life needed more consistency in the way it identified, developed and deployed talent worldwide. Implementing an automated system would enable the organization to gather, leverage and share talent information as a strategic decision-making tool.

Peopleclick Authoria, a leading provider of talent management solutions, was a natural choice to consider. Sun Life was already using Peopleclick Authoria Compensation, and the potential to use a single vendor and an integrated system worldwide was an attractive option. Peopleclick Authoria’s full line of talent management applications, including Development & Succession, offered Sun Life the opportunity to integrate leadership development and succession-planning activities with other essential people management processes.

## Working Together

Sun Life formed an international, cross-functional team that worked together on a virtual basis, and included human resources professionals in each business group, IT leaders, and Peopleclick Authoria. Instead of launching a pilot, the Sun Life team elected to roll out the basic succession-planning application across all business groups simultaneously. One of the major goals of the project was to achieve manager direct entry of talent review data. Sun Life wanted managers to record the attributes of their team members, while also making succession nominations. The company expects management to take ownership of talent decisions – manager direct data entry was critical.

**“The Peopleclick Authoria Development & Succession implementation was a true partnership. Peopleclick Authoria was committed to helping us achieve our vision. We were all in it together.”**

— *Maryann Baird, Employee Development  
Sun Life Financial*

## **Results**

In the first 12 months, more than 1,400 employee profiles were created using Peopleclick Authoria Development & Succession, beginning with all Director roles and continuing with all senior leadership roles up to the CEO. More than 450 managers were able to access those records across all business groups.

In line with Sun Life’s goals, managers assess their direct reports on their strengths, development needs, aspirations, potential and other attributes and enter this data directly into the system through an easy-to-use interface. Now, instead of searching for talent data across multiple sources and formats, managers have a single source of consistent, easily updated and accessible information about Sun Life talent worldwide. The company successfully completed its first annual leadership review cycle using the system, and discovered “a significantly faster and more efficient way to prepare information for talent review discussions,” Klassen observed. In particular, it was easier to develop charts and reports for the review process, and to perform analysis around key demographics and trends.

The Peopleclick Authoria Development & Succession implementation was the first technology application to be used within all Sun Life business groups. The implementation was so well received it was recognized with the company’s CEO Award for Excellence in 2007. What’s next for Sun Life? The company plans to enhance some system functionality and extend the application further into the organization to the next level of management. In addition, increasingly advanced trend analysis will be a major focus of the company’s leadership-development process going forward.

“We’re still learning the full analytic power of Peopleclick Authoria Development & Succession, but none of this would have been possible without the ability to collect and access consistent data,” Klassen noted. “Peopleclick Authoria Development & Succession will ensure we always have a good view of our worldwide leadership talent.”

## **About Peopleclick Authoria**

Peopleclick Authoria is transforming Talent Management through best-of-breed technology and expertise. With a deep focus on business intelligence and analytics, the Company’s technology gives clients the actionable insight required to make strategic decisions that drive better business results. Nearly 60 percent of the Fortune 100 use Peopleclick Authoria Talent Acquisition, Talent Management and Workforce Compliance and Diversity solutions to manage salaried, hourly and contingent labor across their organization. These solutions manage the entire talent lifecycle from recruiting to onboarding and through the ongoing management of each individual’s career while helping organizations measure, analyze and empower their existing workforce. Both founded separately in 1997, the two human capital management companies joined together in 2010 to form Peopleclick Authoria. The Company’s solutions currently support more than 2,400 organizations ranging in size from large, global corporations to small and medium-sized businesses in more than 214 countries and territories.



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