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Sidler & Company^{LLP}

CHARTERED ACCOUNTANTS

First-class service. Trusted advice.

Managing human capital

- Who is Sidler & Company LLP;
- HR issues faced by a small firm;
- Who is on our bus? The ProfessionalPro™ profiling tool;
- SMG's Automated Tracking System (ATS);
- Next steps: Managing Effort and performance coaching;
- Challenges faced;
- Results.

Sidler & Company LLP

- Full-service, single-office accounting firm with five partners;
- Mission: To provide first-class service assurance, tax and advisory services to successful privately owned enterprises;
- Vision: The firm will grow into a first-class public accounting firm that is recognized by our peers and clients as a leader in our market. Our firm will provide rewards for **self-managing staff** and the partners that exceed those of other firms. Our firm will be recognized as one of the best companies to work for in Mississauga;
- Core values: Client focus, Team work, Trustworthy, Attitude.
- Business model: We make money by the hour. How many hours can you work?

The Before

- Ad hoc hiring practices based on budgeted increases in chargeable hours;
- Candidate pool limited to resumes seen in last 2 weeks;
- Annual performance reviews with no self-assessment, no written comments – a salary negotiation;
- Ad hoc “bonus plan” that adjusted salaries to market;
- None of the firms partners had any HR training.

HR issues faced by the firm

- Do we have the right team-members on the bus?;
- How do we evaluate performance? Results?
- Incidence of turnover at the CA level (most productive, best trained, least supervised);
- Inability to hire the students that we wanted – lost to competition;
- HR manual in its 3rd year of preparation.

Why me?

- HR person (by default) was leaving for an extended parental leave;
- Looking for opportunities for personal challenge at work;
- Disliked the fact that we were not hiring the candidates we wanted;
- No system, no process;
- Paper chase was immense.

Who is on the bus?

- SMG completed a culture study of the firm using their ProfessionalPro™, normative personality profiling system;
- In November 2003 we learned: The firm was self-managing within a process oriented environment, is team oriented and comfortable with structure and systems. The firm was comfortable in dealing with conflict had average people orientation and was attentive to detail;
- SMG confirmed what we suspected about our culture and supported it with mathematical analysis;
- SMG allowed us to identify candidates that had similar profiles to our best performers.

Profiling system

- We were encouraged by the accuracy of the profile results;
- Based on the mathematical analysis we knew who was on the bus;
- We could compare the firm's culture with a new candidate and try to match the profiles of our golden eagles to our new hires;
- But the profile was just the start and we needed a system to manage our HR processes.

SMG's Automated Tracking System (ATS)

- 31,000 CA's in Ontario needed to work for A CA firm and acquire a certain mandated number of audit and tax hours at one point in their career;
- As an office designated to train students and a public listing with the ICAO we received many resumes;
- 20 applicants apply for a position with the firm on-line every month;
- Prior to the ATS we received letters, faxes, hand deliveries of resumes.

SMG's ATS

- The tracking system gave us a way to consolidate the flow of resumes into one portal;
- All applicants are pre-screened through the ATS;
- ATS candidate information is retained for all-time and is easily accessible over the web;
- ATS fits seamlessly with our existing website;
- ATS reduced the paper chase and allowed for remote accessing of the data.

Customized Selection Rater

- $P = T \times E \times O$;
- The **talent** piece was assessed using the profile;
- SMG to assisted us in developing a structured interview with a view to measuring **effort** history;
- SMG also developed a series of cultural fit questions for an interview to attempt to assess a measure of **opportunity**;

The process

- Step 1: on-line pre-screened application, accessible over the web;
- Step 2: structured interview and analysis of fit to our newly defined culture;
- Step 3: ProfessionalPro™ profile;
- Step 4: reference check;
- Step 5: electronic offer letter.

Next steps: Managing Effort

- 3 partners attended SMG workshop in Dec. 2003: Managing Effort, Getting Results;
- Paradigm shift: Effort vs. Results, Ask vs. Listen. Coaching vs. Coaxing;
- Concepts retained: Admission ticket, Return on Energy;
- What's next? Roll-out of our program to our senior employees and managers;
- May 2005: Managing Effort program delivered by SMG to 12 senior staff;
- Jan. 2006: Principles of Self Management delivered to all professional staff by SMG.

Ongoing support by SMG

- We supported the lessons learned and training from the workshops with individual one-on-one **performance coaching** from SMG;
- Coaching process allowed me to develop (with help) the new self-assessment annual review template;
- Further step was to develop position profiles for a staff accountant and tax accountant that documented performance objectives for new team members.

Training results

- Our team members understand accountability for results and responsibility for effort, behaviour and performance;
- Our team members understand the jargon: admission tickets, golden eagles etc.;
- Our team members make and keep commitments;
- Our culture is performance based.

Challenges faced

- Setting expectations for hours of work (35 hours per week);
- Asking employees for annual salary expectations;
- Enforcing the admission ticket;
- Managing the on-line application process (to do list);
- Integrating on-campus recruiting activities;
- Timing in the year of the performance review process;
- Evaluating current bonus system (effort vs. results).

Results

- Our new team members are required to read the Principles of Self Management;
- A fully developed HR hiring process;
- Ongoing coaching of our professional staff;
- New team members have performed well in our firm, further validating our culture and hiring process;
- A large pool of potential candidates exists on-line;
- Annual review address performance issues not just salary expectations.



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