

Case 2: Talent Management Process

You are a people manager at Fortis Accountants, a mid-size accounting firm, and it's time for the annual performance reviews. You meet with Bruce, one of your direct reports, for his performance review. Bruce is a Black man with a slight Ghanaian accent who moved to Canada when he was 27 years old. He's going into his third year as a junior accountant at Fortis. Before moving to Canada, he was a senior accountant at a small-sized firm in Ghana. You've been Bruce's people manager for the past two years and you always look forward to his review. You see no problems with his performance: he always meets his deadlines, he's dedicated to his work, and he's reliable. He's one of your strongest team members!

When Bruce enters your office for the review, he seems tense. You assume it's because of personal reasons and proceed with his evaluation. You tell him how well he's doing and that he's one of the highest-ranking employees on the team. "You're a valued employee," you say. "The team is stronger because of your contributions."

You then tell him that he will be receiving a 10% salary increase next year—the highest allotted pay raise you're able to give out. While you're excited to share this news with him, Bruce still has the same tense demeanour as when he walked in. "Is everything ok?" You ask him, and Bruce shifts uncomfortably. "You can discuss anything with me," you say, assuring him that you will be discreet.

Bruce tells you that he's frustrated in his current role. He says that this year he's applied to be a senior accountant on three separate occasions. "This is the second year in a row that I'm the highest-ranking staff on the team. I don't understand why I'm always being overlooked."

Bruce reminds you that he was a senior accountant in Ghana, so he has the experience. He's a mentor to new accountants who are being onboarded, he's always being asked to complete overflow work from senior accountants, and he's even had some senior accountants come to him for advice. "I think I'm more than qualified for the positions I've applied for. Are you not supporting my applications for these promotions?"

You're stunned. He's not angry with you; he's hurt and confused. "I have supported and approved every application you've submitted for an internal position," you tell him. Bruce is even more confused now. "There could be a number of reasons why you're not getting the promotions." But even as you say it, you're not quite sure why he's not being promoted.

You tell Bruce that his feelings are valid and that you're just as confused as he is. He thanks you for validating his feelings and for his performance review, then heads back to his desk.

Once Bruce leaves your office, you're still unsure about your conversation. You pull out his file and review the résumé he submitted for the most recent job opening. He has over six years of experience as an accountant; he has a bachelor's and a master's degree in accounting, and before receiving his professional designation, he gained extensive internship experience in an accounting firm. His soft skills are exactly what the firm is looking for in their senior accountants—he's an active

member of the firm's volunteer mentorship program, he's attended multiple non-mandatory training seminars, and he's never received any disciplinary action. In his file, you notice the notes from his first interview with the firm. Bruce stated, from the beginning, that he was looking to gain more experience and grow his career at Fortis.

You go onto the internal job application portal, which is only accessible to internal staff at the firm, to see what the application process is like. Employees looking to apply must enter their first, middle, and last names and list their highest level of education, their designations, if any, and any awards or certifications they've received. They must also include all of their work experience, including the location of their previous experience. They must list the languages they speak, along with their level of fluency. The final stage of the application process is to include a headshot.

With this information, you decide to meet with Bill, the senior accounting manager who was hiring for the last position to which Bruce applied. Bill is an older white gentleman who's been with the firm since before you started. You've only ever spoken to him a few times. You knock on his office door and ask him if he has a few minutes to discuss the recent senior accountant position. He tells you that the posting is closed—they hired a junior accountant named Michael.

You tell Bill about Bruce and how you would like to suggest some additional training he could take before applying for the next vacancy. You ask him why Bruce wasn't selected for the position. "Bruce was more than qualified for the position," Bill says, "but I had to go with my gut. Bruce just wasn't the right fit."

"Bruce is ready to move up at the firm," you tell Bill. "What does he need to do to not be overlooked next time?"

Bill thinks for a moment before saying that he'll have get back to you. "I don't really have an answer for you at this time."

Walking back to your office, you think about Bruce's experience as an employee at the firm. Based on what Bill said about Bruce's application, you start to believe that Bruce isn't being overlooked because of his performance; he's being overlooked because of his background. Sure, Bruce has an accent, but he's never had any issues communicating with you, clients, or coworkers. Is he being overlooked because he's Black or from Ghana? Come to think of it, Fortis employees who are people of colour only hold junior level positions, while all of the senior level staff, partners, and board members are white.

Questions:

- (1) Were there any "red flags" regarding the internal application process? What requirements should be removed? What information is necessary to collect?
- (2) Why isn't it crucial to ask for information regarding a candidate's identity on an application? Could asking the candidate to present a headshot impact their recruitment experience? If so, how?

- (3) What are the harmful repercussions of following a gut feeling? Is there a time and place when it would be appropriate to follow your gut?
- (4) How would representation at Fortis Accountants impact Bruce's experience as an accountant? Would greater diversity at the firm have changed the outcomes of Bruce's multiple applications?
- (5) Is Bruce's situation a case of discrimination? Was this a direct attack on Bruce because of certain aspects of his identity (i.e., being Black, being trained in another country, etc.)?

Additional Resources for Case 2:

- A Fairer Way to Make Hiring and Promotion Decisions (article by Harvard Business Review), [here](#)
- 8 Ways to Have a Fair Process for Promotions (blog post by Great Place To Work), [here](#)
- 5 Questions to Answer For More Inclusive Talent Management (article by Inclusive Leaders Group), [here](#)

Source: DEI Case Collection for Professional Accountants, University of Toronto Professional Accounting Centre, 2023, PAC website <https://www.utm.utoronto.ca/pac/case-collections/dei-case-collection-professional-accountants>.