



# IGM Financial's Five-Hour Training Program Yields Measurable Cultural Returns

IGM Financial

Best Learning Program that Supports and Promotes  
Diversity, Equity, Inclusion and Belonging

March 2025



## Company Background

Company-at-a-Glance	
Headquarters	Winnipeg (MB) Canada
Year Founded	1926
Revenue	Approx. \$107 billion Assets Under Advisement
Employees	5000
Global Scale (Regions that you operate in or provide services to)	Canada
Customers/Output, etc. (Key customers and services offered)	Financial Planning for Canadians
Industry	Banking, Financial Services and Insurance
Stock Symbol	XTSE : IGM
Website	<a href="https://www.ig.ca/en">https://www.ig.ca/en</a>



## Budget and Timeframe

Budget and Timeframe	
Number of (HR, Learning, Talent) employees involved with the implementation?	8
Number of Operations or Subject Matter Expert employees involved with the implementation?	3
Timeframe to implement	5 months
Start date of the program	November 2023

## Business Conditions and Business Needs

The need for greater diversity in financial services is well known. While achieving a more diverse and inclusive financial services industry will take time, creating a more inclusive environment can start today. Striving to be an ally is a fundamental element of inclusion and a step that any individual can take to drive change. This change needs to be implemented at not only the employee level but also within the network of independent Financial Advisors who serve clients across Canada.

The comprehensive Allyship Training Program is designed to equip both IGM employees and independent IG Wealth Financial Advisors with the essential knowledge, skills, and attitudes needed to become an effective ally and create inclusive spaces in both their community and workplace. Throughout the journey, learners engage in various learning activities to deepen their understanding of allyship.



## Design

### PROGRAM OVERVIEW:

### LMS Program Page:

**IGM Financial** | **IG WEALTH MANAGEMENT** | **MACKENZIE Investments**

## Allyship Training Program

Welcome to the Allyship Training Program! This comprehensive program is designed to equip you with the essential knowledge, skills, and attitudes needed to become an effective ally and create inclusive spaces in both your community and workplace. Throughout your journey, you'll engage in various learning activities to deepen your understanding of allyship.

**PROGRAM OVERVIEW:**

- 1. Article: "Journey to Allyship"**
  - Start your learning journey with this thought-provoking article that will introduce you to foundational concepts of allyship.
- 2. eLearning Module: "Turning Allyship into Action"**
  - This course will provide a deeper dive into actionable strategies towards allyship and being an ally.
- 3. CCDI Webinar: "Allyship: What type of Ally are you?"**
  - In this recorded webinar hosted by the Canadian Centre for Diversity and Inclusion (CCDI), will explore different roles to allyship and will help you identify your unique style as an ally.
- 4. Article: "The Dos and Don'ts to Make You and Effective Workplace Ally"**
  - Gain valuable insights and practical tips from this article published by CPA Canada that explores actions and behaviours that can hinder or enhance your effectiveness as an ally.
- 5. eLearning Module: "Allyship in the Workplace"**
  - Engage with a recorded webinar that delves into crucial allyship themes to deepen your understanding of what it means to be an ally in the workplace.

**Learner's workbook:**

Accompanying this training program is your Learner's Workbook. The workbook contains:

- Instructions:** How to complete each learning activity.
- Note-taking Sections:** Capture key points, insights from each learning activity.
- Reflection Activities:** Engage in reflective exercises during and after each learning activity.

The workbook will serve as a valuable resource, allowing you to consolidate your learnings for continued growth as an ally.

**IMPORTANT:** Keep your workbook handy. As you complete each learning activity, utilize your workbook to take notes and complete reflection activities.

**Approximate hours of study**

This program will take you approximately 5 hours in total to complete. You may complete learning activities in a manner that fits your schedule.

**Program Completion**

Upon successful completion of this program, you will be awarded with a digital badge sent from IG University within 2 weeks of completion. You may use the badge to promote your commitment to allyship on your email signature, as well as your social media profiles.

**Getting started**

To begin, click on the **Agenda** tab at the top of this page, which will bring you to the program.



## 1. Article: “Journey to Allyship”

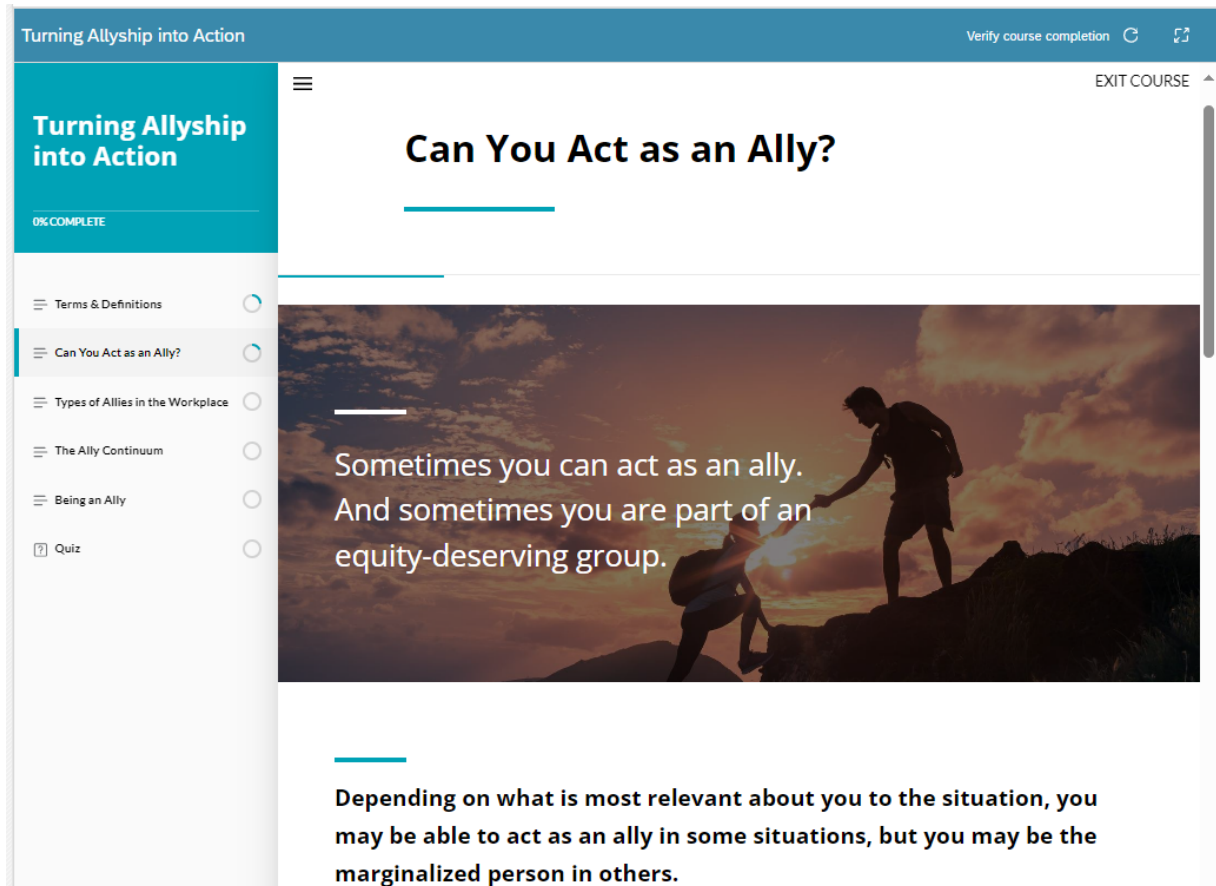
- Start the learning journey with this thought-provoking article that will introduce the foundational concepts of allyship.





## 2. eLearning Module: “Turning Allyship into Action”

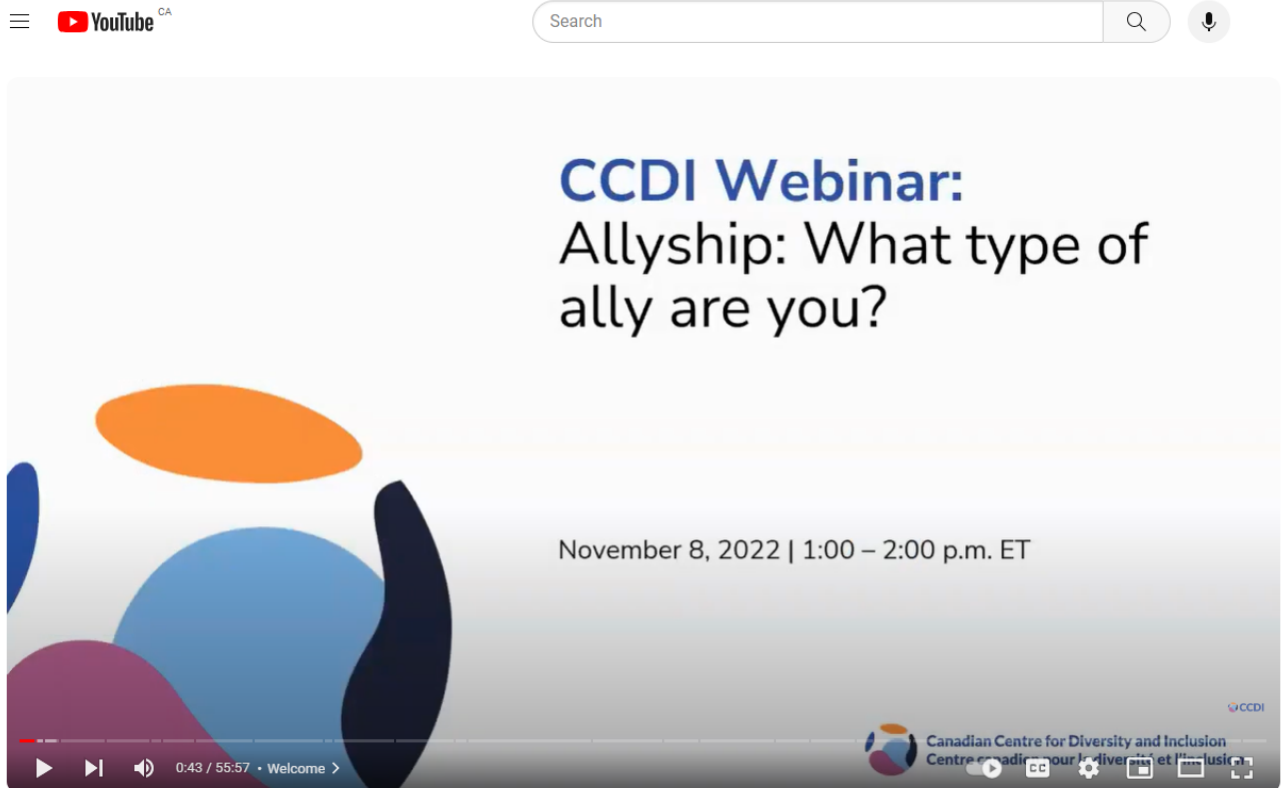
- This provides a deeper dive into actionable strategies towards allyship and being an ally.





### 3. CCDI Webinar: “Allyship: What type of Ally are you?”


- In this recorded webinar hosted by the Canadian Centre for Diversity and Inclusion (CCDI), explores different roles to allyship and will help learners identify their unique style as an ally.





#### 4. Article: “The Dos and Don’ts to Make You and Effective Workplace Ally”

- Gain valuable insights and practical tips from this article published by CPA Canada that explores actions and behaviours that can hinder or enhance one’s effectiveness as an ally.

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Home / News / @Work / The dos and don'ts to make you an effective workplace ally




Tools

## The dos and don'ts to make you an effective workplace ally

It's more than a written policy. Change comes from the actions leaders and colleagues take, experts say

The recent [Black Lives Matter](#) protests, sparked by the death of George Floyd, have amplified how underrepresented groups, in particular Black people, are treated in the workplace.

[Corporations](#) are scrutinizing their diversity and inclusion policies to determine whether they are uplifting underinvested groups—such as Black, Indigenous, People of Colour, women and LGBTQ2S+ employees—or perpetuating systemic barriers and preserving an inequitable status quo.



**About the Author**  
**Sophie Nicholls Jones**  
*Associate Producer, CPA Canada*  
  
Sophie Nicholls Jones is a seasoned reporter, writer and editor, with a focus on the business and financial sectors.





## 5. eLearning Module: “Allyship in the Workplace”

- Engage with a recorded webinar that delves into crucial allyship themes to deepen understanding of what it means to be an ally in the workplace.

Allyship in the Workplace

Verify course completion

EXIT COURSE

### Allyship in the Workplace

33% COMPLETE

- Themed Allyship Webinars ☒
- Reflection Activity ☐
- Completion Acknowledgement ☐

## Themed Allyship Webinars

The following recorded webinars provide you with opportunities to deepen your understanding, and pathways to meaningful change.

Please watch **ONE** of the following webinars of your choice:



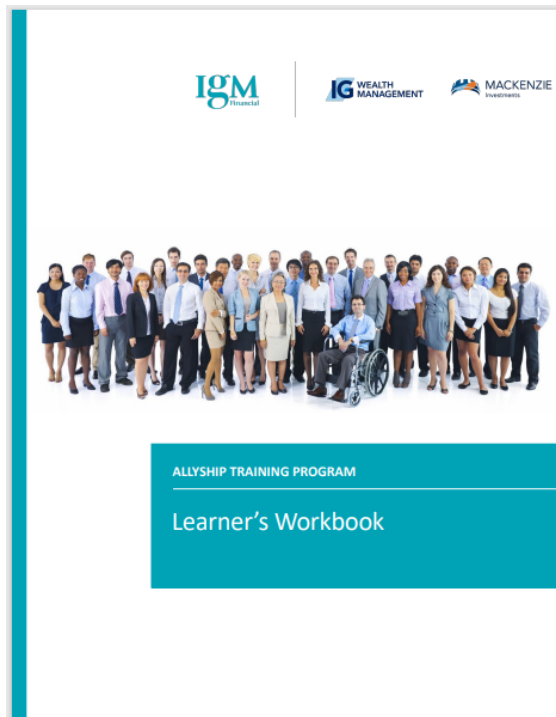


### **Learner's workbook:**

Accompanying this training program is the Learner's Workbook. The workbook contains:

- **Instructions:** How to complete each learning activity.
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- **Reflection Activities:** Engage in reflective exercises during and after each learning activity.

The workbook serves as a valuable resource, allowing learners to consolidate their learnings for continued growth as an ally.



3. What are some strategies for moving forward?

**Reflection**

Think about the actions listed below and add a checkmark next to each of the actions you can practice.

- ☐ Speaking out against any harmful behaviour (racist remarks, biased opinions etc.)
- ☐ Helping others use gender-neutral language
- ☐ Ensuring communications are accessible
- ☐ Supporting equity-deserving groups by volunteering or by purchasing items from their small businesses
- ☐ Ensuring that accommodation and supports are provided
- ☐ Donate to equity-deserving groups' organizations
- ☐ Educate yourself on equity deserving group's barriers and challenges
- ☐ Advocate for equity-deserving groups' needs

**Reflection**

Write your response(s) in the space provided below each question.

Now that you understand some actionable ways to practice effective allyship and how to move through the allyship continuum, answer the following questions:

1. What are 1-2 actionable ways you will practice effective allyship?

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### Approximate hours of study

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Upon successful completion of this program, learners are awarded with a digital badge within 2 weeks of completion. Learners may use the badge to promote their commitment to allyship on your email signature, as well as your social media profiles.



### Delivery

The Allyship Training Program was delivered through IGM's learning management system. As part of the delivery strategy for DE&I initiatives, employees and independent financial consultants are encouraged to complete the training program as well as join one of the Business Resource Groups (BRGs). BRGs are focused on building an inclusive work environment; talent attraction, retention, and development; generating business value through internal and external activities.

These communities play a critical role in creating a workplace that supports diversity of background, thought and perspective, and is a key component supporting the success of our Diversity, Equity and Inclusion (DE&I) journey.



## Measurable Benefits

Use this area to discuss the measurable benefits of the learning program. How did it help your organization meet its diversity, equity, inclusion and belonging objectives and business goals? Make sure the benefits are specific and quantifiable.

**Details:** The Allyship Training Program is one of the many important initiatives that have contributed to the high level of engagement that employees have for the company. The results from the most recent Employee Engagement Survey illustrate the impact of the effort and contributions of not only the Human Resources team at IGM Financial, but also the contributions from employees across the organization through their level of engagement with the programs that are offered.



## Employee Engagement Results

### DEI (vs last year)

- 89% This company has created an environment where people with diverse backgrounds can succeed. (0%)
- 88% In my team, everyone can succeed to their full potential, no matter who they are (e.g., age, race, gender identity, religion, diverse ideas, etc.). (-1%)
- 86% I am comfortable voicing my ideas and opinions, even if they are different from others. (+2%)
- 82% I feel as if I belong here. (-1%)

## Overall

The comprehensive Allyship Training Program was designed to equip both IGM employees and independent IG Wealth Financial Advisors with the essential knowledge, skills, and attitudes needed to become an effective ally and create inclusive spaces in both their community and workplace. This training initiative is one of many programs that are offered as part of the greater DE&I strategy and was the first program offered through the IGM University. Through this initiative, IGM learned that there is still much work to be done in creating equity across the organization. Future training programs to build on the Allyship and broader DE&I conversation, including partnerships with external providers will allow IGM to continue expanding the conversation and reaching everyone whether an employee or an independent financial advisor to understand the role they play in creating an inclusive environment for all.



Brandon Hall Group™

**EXCELLENCE  
AWARDS™ 2024**

CASE STUDY

## About Brandon Hall Group™

With more than 10,000 clients globally and more than 30 years of delivering world-class research and advisory services, Brandon Hall Group™ is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

### Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

### Membership

Individual and Enterprise Membership options: Includes research assets, advisory support, a client success plan and more.

### SOME WAYS WE CAN HELP

### Excellence Awards

Three annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

### Advisory Offerings

Custom research projects, including surveys, focus group interviews and organizational needs assessments for transformation, technology selection and strategy.



#### ENTERPRISE EXCELLENCE CERTIFICATION PROGRAM

Recognizes the best HCM programs that transform their organization and achieves breakthrough results. This designation is a step above the HCM Excellence Awards® which focuses on one program within a company. Enterprise Excellence is a hybrid of award winners who are also members.



#### SMARTCHOICE® PREFERRED PROVIDER PROGRAM

Uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's thirty-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.



#### AGENCY! BY BRANDON HALL GROUP™

Provides comprehensive marketing solutions for human capital management solution providers. We offer strategic services to establish a strong foundation for your marketing efforts.