

CCMA Members Forum

Investing in Talent

FEBRUARY, 2023





Agenda

WELCOME & OPENING REMARKS

Teresa Kelly, Head of Investor Services **Kristine Suplinska**, Investor Services Manager

TALENT SOURCING & RETENTION

Owen McSweeney, Talent Acquisition Lead

CAREER DEVELOPMENT & MENTORING

Patty Hill, Professional Development Program Manager

PROFESSIONAL DEVELOPMENT RESOURCES

Declan O'Dwyer, Global Practice Lead

MY CAREER JOURNEY

Mairead Dillon, Manager Laura Linehan, Manager Rhona McKeigue, Technical Coordinator Vivienne O'Neill, Technical Coordinator James Costello, Senior Analyst



INVESTOR SERVICES AT NORTHERN TRUST

Recruitment

Attracting and Recruiting Top Talent

Onboarding

New Partner Orientation Programmes

Support

Providing Support Tools and Processes

Coaching

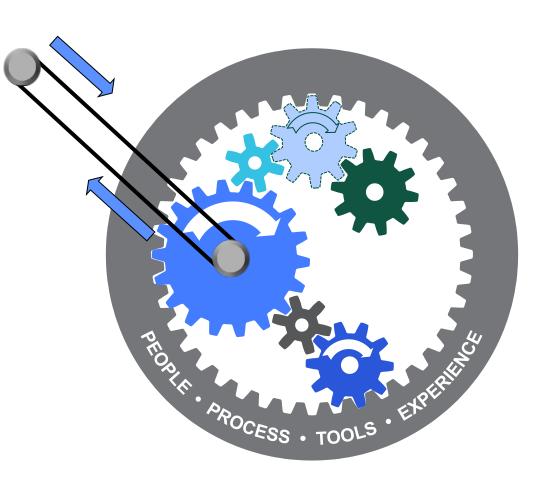
Evaluating and Providing Ongoing Coaching

Development

Enhancing Career Opportunities Through Development

Feedback

Regular and Rounded Feedback



Ireland
Campus, Early
Careers &
Experienced
Recruitment Strategy

Owen McSweeney
Talent Acquisition Lead





EMEA TALENT ACQUISITION - DIVERSE HIRING STRATEGY





















Ireland - Campus & Early Career Programs

- <u>Limerick Internships</u> 6 8 months in duration. Campus partners University of Limerick (UL) and Technological University of the Shannon, Midlands Midwest (TUS). This year, we have employed 51 intern students across 11 different business units in LMK. Internships are managed directly by the placement officers on Campus with Talent Acquisition.
- Rotational Development Program (RDP) 18 months Global Fund Services rotation within Fund Accounting, Custody & Transfer Agency. This program is advertised on our external job boards and internally for partners with up to 3 years work experience at Non - Officer level.
- <u>Irish Fund Services (IFS) Apprentice Program</u> In collaboration with The National College of Ireland Level 6 Certificate in Financial services. This program is advertised on both the Open Doors Initiative & Engage in Education websites.
- <u>UL Cyber Apprenticeship Programme</u> In collaboration with The University of Limerick – Level 8 Degree in Cyber Security. This program is advertised on Grad Ireland, Irish Jobs and our NT careers website.

We believe you're made for greater.

Ireland - DE&I Campus Activity

Campus Student Societies & Partnership Agencies

- Open Doors Initiative (include refugees, asylum seekers and migrants, people with disabilities and disadvantaged youth, those from a Traveller background, LGBTIQ+, people with a criminal past, and any intersectionality between the groups.) Engage in Education (DEIS schools in LMK), Employability (candidates with a disclosed disability) and Specialisterne (candidates with a disclosed disability).
- UL LGBTQ+ student society, NT is the Corporate sponsor for academic year 22/23. We are currently working to sign the same Corporate sponsorship with TUS but this is yet to be confirmed.
- UL & TUS Disability & BAME student societies. Ongoing collaboration with UL Disability office – NT was the Co-Founder of The Mid West Disability forum.

Bursary & Scholarships

• NT provide annual sponsorship awards for best academic QCA results (UL) and bursary scholarships (TUS).

Advertising Grad Roles

• Grad Ireland new partnership, Careers connect - internal Campus Job Boards and rehire of past intern students.

Career Development & Mentoring

Patty Hill
Professional Development Program
Manager





Career Development Philosophy

is a process where partners, with the support of Northern Trust and their managers, pursue opportunities to grow their skills, knowledge, and careers. At its best, it is a **collaborative and cooperative** effort between partners and their managers or mentors.















Ownership

It's up to individual

partners to own their

development, where

they want their career

to go, and to make use

of the people and

resources available.





example.

Managers / Mentors play a key role in career development conversations by encouraging, guiding, advising and sharing feedback with partners, and connecting them to relevant development opportunities like networking, cross functional projects or stretch assignments for

Organisation

Northern Trust creates opportunities and provides the tools, assessments, resources and training to help partners and managers define and build their development paths and have development conversations.

Continuous

Career Development plans should be part of the partner's goals created at the start of the year and focused on the individual's ambitions for today and tomorrow. The plans, goals, objectives, and feedback are continuously reviewed, updated and reflected on throughout the year in 1:1s.

Development Path

Career Development can take many forms; from in-place enrichment and exploration, social growth, or role growth that could be lateral, vertical, realignment or relocation. Development plans should incorporate 70% experience opportunities, 20% relationship building, and 10% educational learning. This blended approach will accelerate your development exponentially.

Career Development Paths



Lateral



Exploration





Enrichment





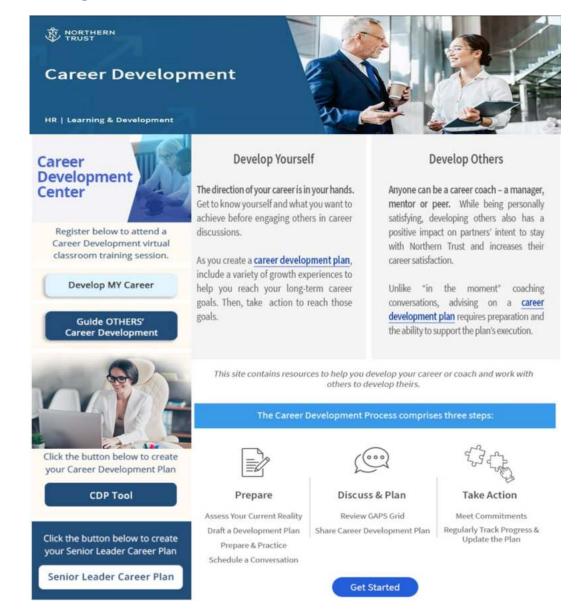


Vertical





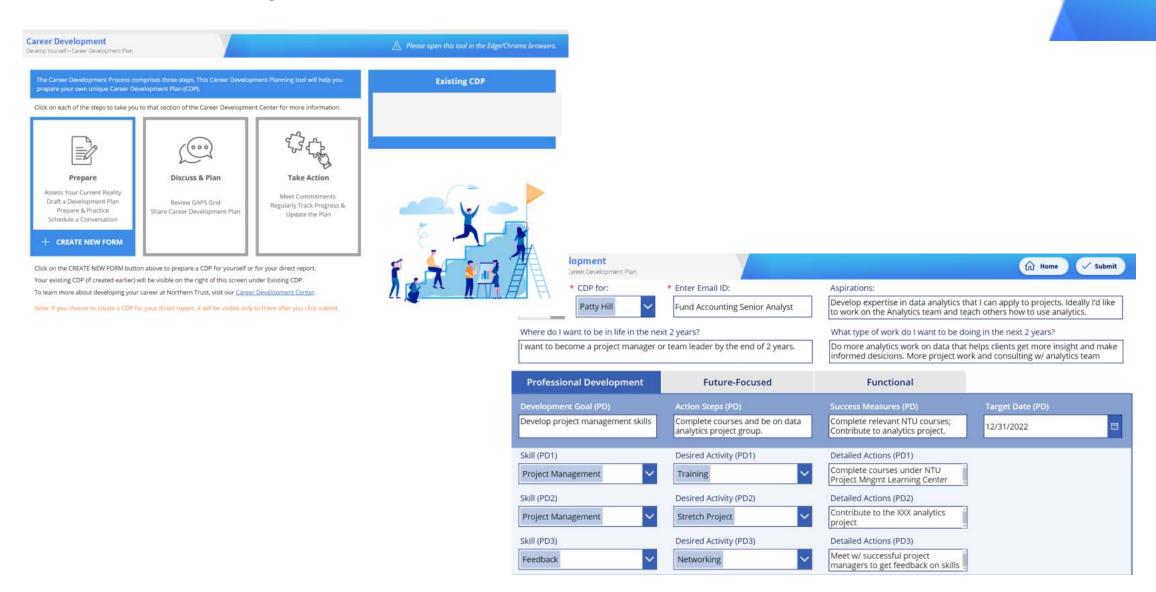
NTU Career Development Center



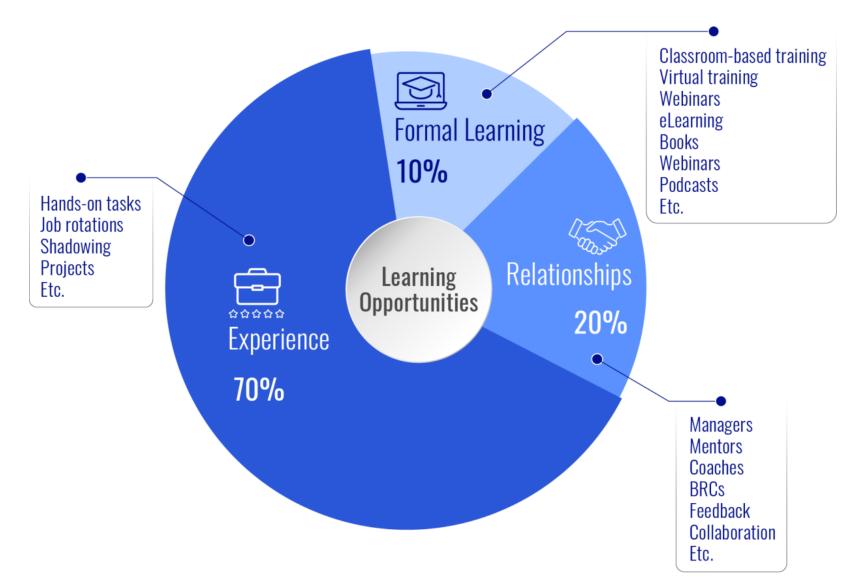
Gaps Grid

Where I Am Now Where I Want To Go **Abilities Goals and Values** What are you good at? What type of work do you What are your specialist My want to pursue? View areas? Where would you like to What tasks do people ask be in 2 years? you to help with? What is important to you? **Perceptions Success Factors** How do other people What will make you perceive you? successful? Other's How will you know when you How could you get the **Views** have reached your goal? views of other people? Who could you ask?

Career Development Plan Tool

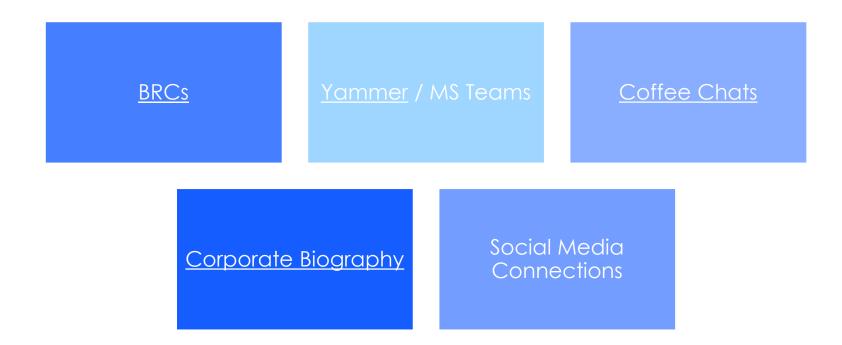


70-20-10 Development Model



Networking

Networking is the process of interacting with others to exchange information and develop professional or social contacts. It is about relationships, connections, sharing ideas and expertise rather than about building your skill-set.



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Benefits of Networking

- Exchange ideas and extra sources of information
- Makes you more noticeable
- Opens the door for new opportunities
- Support from peers and leaders
- Increase self-confidence
- Develop long lasting relationship

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Mentoring

Mentoring is a mutual relationship built on trust and respect, designed to develop skills, share knowledge and experiences, and advance both mentors and mentees along their professional path.

 Understand issues, alternatives, & make decisions



THE BIGGER PICTURE

 See the bigger picture

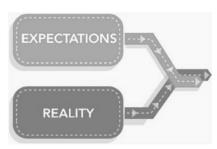
Impartial opinions



 Evaluate career path



 Manage expectations





 Creates more inclusive, equitable & culturally competent workplace.

NTU Elevation Mentoring Center



Elevation Mentoring at Northern Trust encourages knowledge sharing, awareness of career development options, and partners' engagement with the Northern Trust culture.

This self-service portal contains training, guides and resources to create and maintain a successful mentoring relationship.

The Elevation Mentoring process comprises of the following stages:

Click on each of the stages below to get started.



Groups / Circles

- Asset Servicing Mentoring Circles
- Ireland WIL Lean In Circles Females
- EMEA WIT Mentoring Circles

1:1 Mentoring

- Ireland Empower Mentoring
- NA APRC Professional Partnerships Program
- GFS Mentoring Program
- EMEA Risk & Compliance Mentoring

Other

- RDP Mentoring
- ETLP Mentoring
- BRC Mentoring

Tap into L&D

Declan O'Dwyer

Global L&D Operations Lead







OBJECTIVES







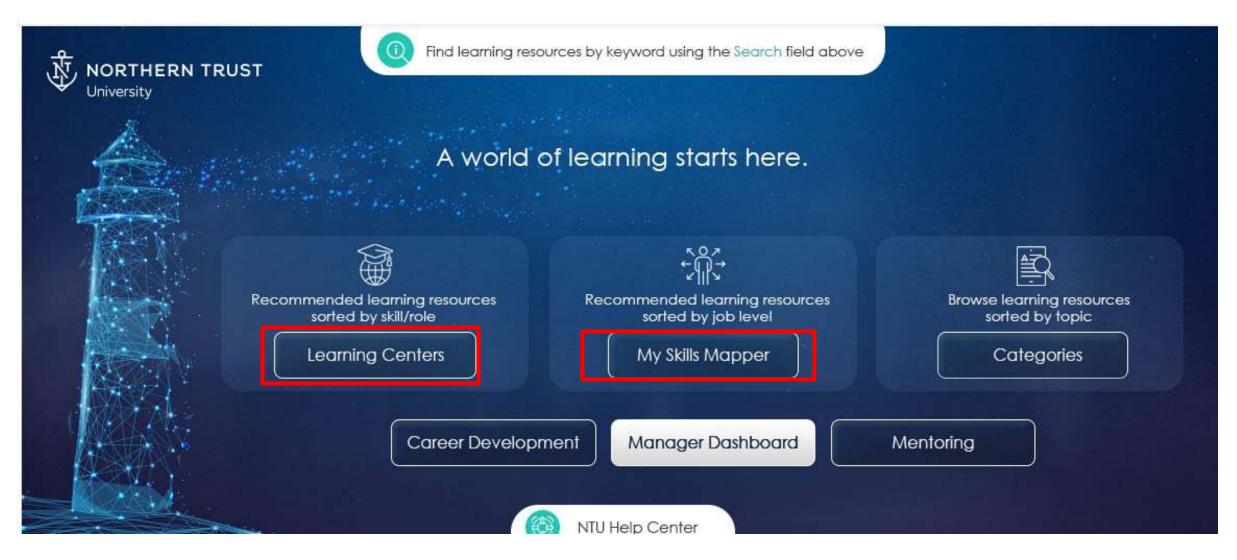


Northern Trust
University (NTU)
Introduction

NTU Skills Mapper and Learning Centers Tap into
Instructor Led
Training and
Educational
Assistance

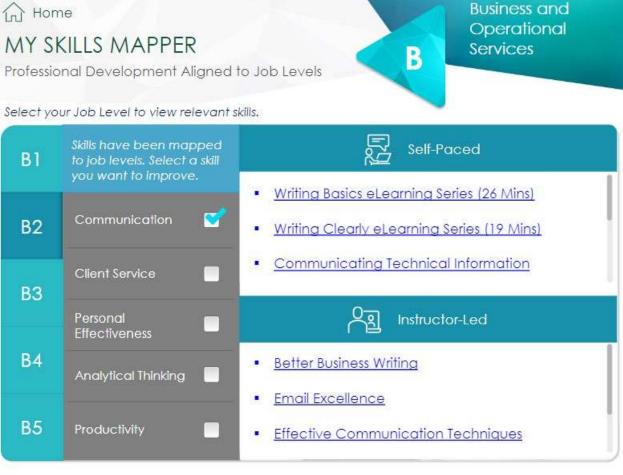
2023 Future Plans

Tap into L&D - Northern Trust University



Tap into L&D: NT Skills Mapper





Tap into L&D – Professional Development Learning Center



Welcome to the Professional Development Learning Center

The learning centers below include recommended resources to develop a number of critical skills. Each learning center contains both short micromodules to introduce you to a topic along with longer, more indepth options for partners who want to learn more. You can access these learning centers by clicking on the tiles below.

If you are interested in a topic that is not listed, we recommend you use the Browse feature where you can access 40+ categories of professional development content.

You can also perform a keyword search of our learning catalogue using the search bar at the top of this screen.

Finally, watch for regular emails from TMLearning@ntrs.com where we advertise a variety of instructor-led and self-paced classes.





Growth Mindset

Explore

Growth Mindset: Practical Tips (7 mins, self-paced)
Raising Resiliency: Get Out of Your Comfort Zone (5 mins, self-paced)

Core

The Growth Mindset: 01. The Growth Mindset - Embracing Yet (6 mins, self-paced)

The Growth Mindset: 02. Developing Growth Mindset (5 mins, self-paced)

The Growth Mindset: 03. Limitations of a Fixed Mindset (6 mins, self-paced)

Fostering a Culture of Risk Taking (14 mins, self-paced)

Failure: 01. Accepting Failure (6 mins, self-paced)

More

Grit. The power of passion and perseverance | Angela Lee Duckworth (7 mins, self-paced)

Create a Growth Board for Vetting Ideas | Beth Comstock (3 mins, self-paced)

Create: Breakthrough Innovation and Organic Growth | Jeff DeGraff (9 mins, self-paced)

Attack Every Challenge | Shane Battier (6 mins, self-paced)

Shift Your Mindset to "Win-Win" | Kevin Zollman (5 mins, self-paced)

Personal Brand

xplore

Develop Your Personal Brand (25 mins, self-paced)

Like it or Not - You have a Brand (2 mins, self-paced)

Professional Partners (360 mins, virtual-classroom)

Core

Developing Brand You (50 mins, self-paced)

Your Personal Brand Is Connected to Your Employer's Brand (10 mins, self-paced)

What You See Is What You Get - Using Self-Awareness for Your Brand (5 mins, self-paced)

Career Brand: Networking (8 mins, self-paced)

Focus On The Brand Called You (180 mins, virtual-classroom)

Mon

LinkedIn: Create an Effective Profile (10 mins, self-paced)

Career and Life Evolution | Russell Ameraseker (60 mins, self-paced)

Improving Your Resiliency (120 mins, instructor-led)

Tap into Industry Knowledge: Search "Intuition Catalogue"

Intuition have everything you want to know but were unsure who to ask about Financial Services!

On Northern Trust University (NTU) you have access to:

- content used by 90% of the world's financial institutions from entry level to executive.
- 900+ best-in-class self-paced courses that are short, topic specific with up-to-date insights!
- copy the course name from the Catalogue and enter it into the search box to locate on NTU.
- courses are eligible for CPE hours on CFA; ACCA; ICA; CISI; and others. See course homepage.





Tap into Power Guides: Jhana by Franklin Covey







Key lessons

17 ways to persuade

How to prepare to persuade

Solve Common Problems

Direct report doesn't want to do a critical task

Colleague outside my team won't help

My manager doesn't support my great idea

Quick Tips

When giving updates, focus on impact rather than tasks completed

Strategically draw your boss's attention to your top performers' growth and achievements



6 strategies of the silver-tongued

🔀 PDF

Negotiation preparation worksheet

🔓 PDF



- ← <u>Change: How to Turn Uncertainty into</u> Opportunity
- 10-minute action: Identify an obstacle to a change that's holding you back and the first step to overcome it
- Article: 6 common friction points of change and how to work through them
- Article: <u>There's too much change at</u> once
- Video: 4 tips for approaching your manager when you encounter obstacles with a change

Identify an obstacle to a change that's holding you back — and the first step to overcome it

Why do it?

Your first thought might be *This isn't going to work!* when you hit a snag with a change, especially a change that you're skeptical of or that pushes you out of your comfort zone. Obstacles are common—and almost always surmountable if you take a moment to analyze what's holding you back and then figure out a productive way forward.



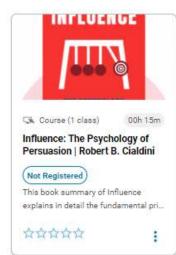
"Trope or not, we need to figure a way off of here."



Tap into Micro-Learning - Blink, Big Think and TED too

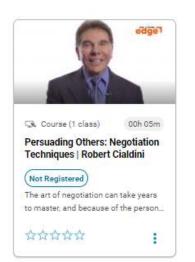
- Specially curated resources
- Short micromodules <u>plus</u> longer in-depth content
- Searchable on Northern Trust University
- Keyword for Search: Blink, Bigthink, TED, MindTools



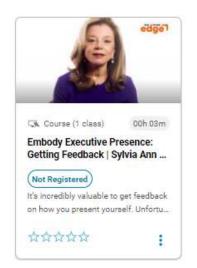




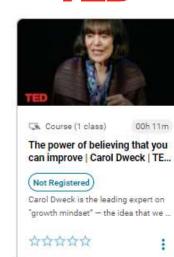


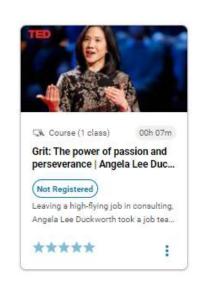




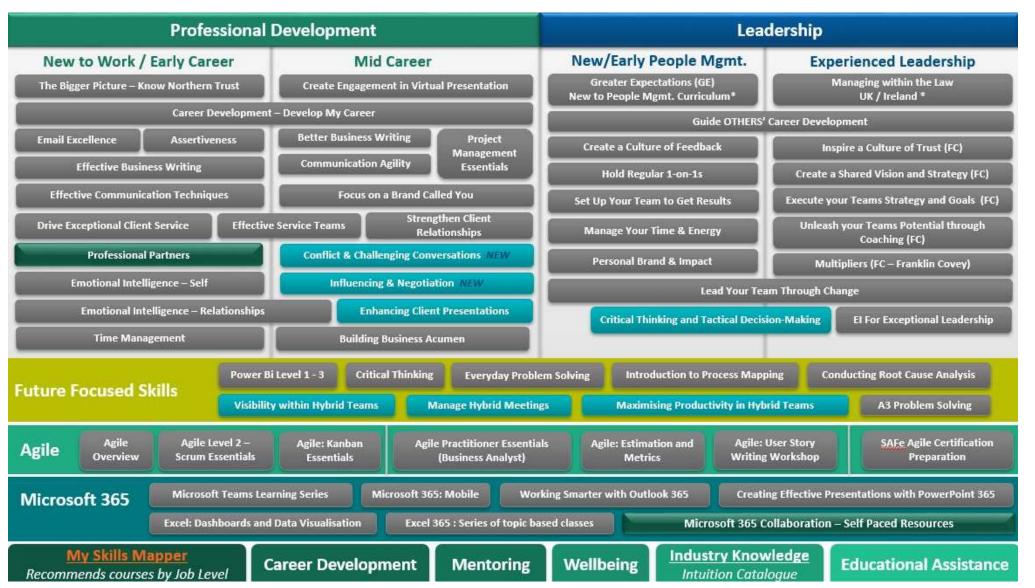








Tap into Instructor Led Learning





Tap into Certification – Educational Assistance

Open to all Permanent NT Partners who are with NT at least 6 months and key criteria is that course is relevant to current or future role in NT

Educational Assistance covers tuition, books, required fees, and examinations up to an annual limit of 9,000 for:

- Academic degrees and diplomas (e.g UL Diploma in Management)
- Specific financial-industry credentic The Institute of Banking





Select Institute of Banking certificate and diploma programs



Popular with our partners: Level 7 Certifications

- Professional Certificate in International Investment Fund Services (Accredited Funds Professional designation)
- Professional Certificate in Consumer Protection Risk, Culture and Ethical Behaviour in Financial Services
- Professional Certificate in Complex Financial Instruments in International Financial Services
- Professional Certificate in Responsible and Sustainable Finance
- Professional Certificate in Digital Risk, AML and Financial Crime Prevention
- Professional Certificate in Digital Financial Services and Data Analysis

Recommended Level 9 Certifications

- Professional Diploma in Digital Transformation in Financial Services
- Professional Diploma in Applied Alternative Investments *

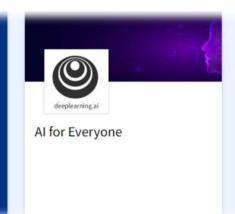


Tap into L&D - What next in 2023?

Access 5,000+ courses, 100+ SkillSets, and 1,900+ Guided Projects from top universities and companies

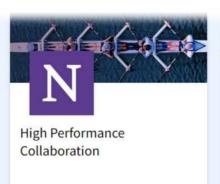


Popular courses from B2B learners in 2021











HK | Learning and Development

My Career Journey



MAIREAD DILLON Transfer Agency Manager



LAURA LINEHAN IR and Quality Manager



RHONA MCKEIGUE Technical Co-ordinator



JAMES COSTELLO Senior Analyst



VIVIENNE O'NEILL Technical Co-ordinator













Thank You

