



People Services Strategic Plan

Through 2027





Message From The Chief People Officer (CPO)

Dear Otakians,

The Otak People Services Team is ecstatic to commence the next phase of our quest to evolve into an award-winning team. We are eager to explore new horizons and embrace exciting opportunities that will enable us to enhance our people services continually for the benefit of our valued staff.

To begin the next phase of our journey, after careful consideration the People Services team has made the decision to transition from the traditional term of "Human Resources" to "People Services." We believe this change better reflects our values and the way we serve Otak and our team members. This shift is more than just a change in nomenclature; it represents our continued commitment to a people-centric approach.

Our foremost objective for the People Services team is to continuously evolve as a thought partner and advisor for leadership and our business units, and, most importantly, focus on recruiting and retaining top tier talent while ensuring an exceptional employee experience.

We are committed to embracing an agile mindset and cultivating a culture that empowers us to implement innovative solutions effectively. The purpose of the People Services team is clear: to foster a culture of collaboration, engagement, learning and professional development, diversity, and inclusion at Otak.

In keeping with Otak's mission, vision, values, and strategic goals, this The People Services Strategic Plan serves as the guiding compass for our team through 2027. Our most significant assets are our talented and dedicated Otak team members, and we recognize that they are the heart and soul of our success. That's why we are unwavering in our commitment to deliver internal client service excellence, contributing to Otak's reputation as an exceptional place to work and positioning us as leaders in attracting, developing, and retaining a diverse and talented workforce.

Best regards,

A handwritten signature in black ink, appearing to be 'S. McElravy', with a long horizontal line extending to the right.

Sheri V. McElravy
Chief People Officer

Our Vision, Mission and Core Values

Our Vision

Empowering a workplace of excellence, inclusion, and growth, our People Services team envisions a future where every individual's potential is maximized. We aspire to be the catalyst for a dynamic and engaged workforce, fostering a culture that not only attracts and retains top talent but also values diversity, innovation, and continuous development.

Through strategic partnerships and a commitment to people-centric practices, we aim to propel the organization to new heights of success, ensuring both individual and collective achievements.

Our Mission Statement

We are dedicated to empowering organizational success through the attraction, development, and retention of exceptional talent, delivering high-impact people solutions, prioritizing team members' experiences, fostering continuous learning, ensuring compliance with best practices, and creating a thriving workplace where every individual contributes to our collective success.

Our Core Values

In our role as your dedicated thought partner and advisor in people services, our team is guided by a set of core values that underscore our commitment to excellence and integrity. In every facet of our work, we uphold the following values:

- **Integrity:** We consistently operate with integrity, adhering to the highest professional and ethical standards in all our endeavors.
- **Respect:** We honor the dignity of each individual, fostering a workplace that embraces civil discourse, diversity, inclusivity, and safety.
- **Responsibility:** We take responsibility for our decisions and actions, holding ourselves accountable for the consequences and ensuring transparency in our operations.
- **Excellence:** Striving for excellence is at the heart of our efforts—both as individuals and as a team—representing Otak with a commitment to exceptional performance.
- **Community:** We actively collaborate for the betterment of Otak, our employees, and the broader communities we serve, recognizing our role as responsible corporate citizens.

Our promise is not only to help Otak thrive but to achieve this by unlocking the full potential of our people. We are dedicated to maintaining agile, efficient practices that are in harmony with Otak's strategic goals, ensuring sustained growth and success.

Our Guiding Principles

The People Services team steadfastly upholds guiding principles rooted in an employee-centric approach, solution-oriented service, collaborative business partnership, and unwavering integrity. Through these principles, our team evolves into a reliable business ally for internal stakeholders, and fosters a culture where employees are not only valued but also empowered for success.

Employee-Centric Approach

- Prioritize the well-being, growth, and development of all Otak team members, recognizing them as essential to Otak's success.
- Implement initiatives that promote a positive work environment, employee engagement, and a sense of belonging within the organization.
- Encourage a mindset of adaptability and learning, fostering an environment where individuals and teams are committed to ongoing growth and development.

Operating with Integrity

- Adhere to the highest ethical standards, promoting a culture of transparency, fairness, and integrity in all interactions and decision-making processes.
- Uphold unwavering dependability, respect, and trustworthiness, establishing a foundation of trust within the organization.
- Demonstrate responsible stewardship of Otak's resources and sensitive information, ensuring ethical conduct in all aspects of our work.
- Exercise prudent financial management to ensure Otak's long-term sustainability, incorporating fiscal responsibility into our commitment to integrity and organizational well-being.

Solution Oriented Service

- Ensure our services align seamlessly with Otak's mission, vision, and goals, dedicating ourselves to delivering our best effort and pursuing excellence in our work.
- Demonstrate flexibility, agility, resourcefulness, critical thinking, and innovation in service delivery, fostering a proactive and solutions-driven approach.
- Embrace a culture of continuous improvement by actively seeking opportunities to enhance our services, streamline processes, and contribute to the overall advancement of the organization.

Collaborative Business Partner

- Align our behavior with the values, objectives, and vision of our team and the organization, embracing accountability for organizational outcomes.
- Proactively identify ways to support and collaborate with our colleagues throughout the organization, promoting a culture of unity and shared success.
- Share data, metrics, and resources to promote transparency and facilitate improvement opportunities, fostering a collaborative and information-sharing environment.

Strategic Focus Areas

Our People Services operation at Otak is underpinned by these ten key strategic focus areas. These areas not only define the pillars of our business model but also serve as a comprehensive roadmap that guides our journey:

- **People Services Excellence:** Delivering exceptional customer service and optimizing our processes to ensure satisfaction, support, and top-notch results within Otak.
- **Workforce Planning and Talent Acquisition:** Securing top-tier talent aligned with Otak's values while strategically planning for evolving workforce needs.
- **Employee Development and Training:** Empowering individuals through comprehensive development programs, fostering a culture of continuous learning and skill enhancement.
- **Employee Engagement and Retention:** Creating a motivated workplace where every team member is fully engaged and implementing initiatives to enhance satisfaction and retention.
- **Performance Management and Succession Planning:** Attracting, nurturing, and developing talent strategically to drive organizational success, with rigorous performance management linked to succession planning.
- **Communication and Employee Relations:** Establishing transparent communication channels and proactively addressing employee concerns to nurture positive relations throughout the organization.
- **Diversity, Equity, and Inclusion:** Actively fostering a workplace that celebrates diversity, promotes equity, and ensure inclusion for all team members.
- **Employee Health and Well-Being:** Prioritizing employee health through comprehensive wellness programs and mental health support to create a vibrant work environment.
- **Technology and Systems:** Staying at the forefront of human resource technology, implementing solutions for streamlined processes and effective use of HRIS data-driven decision-making.
- **Compliance and Risk Management:** Ensuring people services practices comply with relevant laws and regulations, implementing proactive policies for effective risk management.

These focus areas collectively represent our compass as we navigate the transformational journey of Otak's People Services operation, driving our commitment to a brighter, more efficient, and people-centric future.

Objectives By Focus Area

The People Services Strategic Plan emphasizes specific objectives by focus area, aligning our initiatives with overall business objectives. This tailored approach aims to address unique challenges and opportunities within each facet of people services management, fostering organizational growth and cultivating an innovative and inclusive workplace environment.

1. People Services Excellence

- Deliver unparalleled customer service to all team members, characterized by a personalized, compassionate, and empathetic approach that exceeds their expectations.
- Focus on enhancing our operational efficiency and the effectiveness of service delivery to leadership, business units and our Otak team members.
- Implement redesigned processes, self-service capabilities, and automation to increase operational efficiency and contribute to Otak's sustainability goals.
- Develop clear, solution-oriented policies and procedures to provide a framework that aligns with Otak's values and goals.
- Demonstrate fiscal responsibility and excellence in budget management within the People Services team by optimizing resource allocation, identifying cost-savings opportunities, and ensuring efficient utilization of financial resources to support organizational goals.
- Introduce a structured customer feedback mechanism to regularly assess and enhance satisfaction levels, ensuring alignment with Otak's service excellence standards.
- Conduct regular process audits to identify areas for optimization and efficiency improvement, fostering a culture of continuous improvement within the People Services operation.

2. Workforce Planning and Talent Acquisition

- Establish a workforce planning process that anticipates future skill requirements, strategically aligning recruitment efforts to meet evolving organizational needs.
- Formulate a talent acquisition strategy that aligns with Otak's strategic growth plan and goals to attract and hire top-tier talent into the organization.
- Develop innovative recruitment strategies to cultivate a diverse workforce, enhancing Otak's commitment to inclusivity and equity.

- Collaborate with our Marketing team to strengthen our employer brand to showcase our organizational culture, values, and commitment to employee development, fostering a compelling and attractive workplace identity to attract, engage, and retain top talent.
- Streamline the hiring process for efficiency and effectiveness, ensuring a swift and seamless transition from candidate identification to onboarding.
- Implement a comprehensive process for welcoming and onboarding new employees to Otak's culture, fostering a sense of belonging and engagement.
- Establish programs tailored to team members' first year equipping them with essential knowledge, training, and resources for long-term success.
- Implement an internship committee dedicated to supporting the development and execution of a robust intern program.
- Develop and refine an internship program designed to attract and recruit top talent straight from educational institutions, contributing to a pipeline of high-performing individuals.
- Foster strategic relationships with educational institutions to position Otak as an employer of choice, attracting top talent from schools.

3. Employee Development and Training

- Support and introduce initiatives to foster a continuous learning and professional growth culture, and an environment where employees are encouraged and supported in their ongoing development.
- Develop comprehensive transparent career paths with options for both technical expertise and leadership, providing employees with clear trajectories for growth.
- Develop a comprehensive learning and development program offering structured formal training to increase employee knowledge, skills, and capabilities.
- Launch a mentorship program designed to facilitate skill transfer and professional growth among employees, creating a collaborative learning environment.
- Identify high-potential employees and craft personalized development plans to groom them for leadership roles, fostering a leadership pipeline within the organization.
- Develop and implement leadership development programs designed to enhance the skills and capabilities of current and prospective leaders.

4. Employee Engagement and Retention

- In collaboration with leadership, establish and cultivate trust between employees and leadership by actively soliciting feedback through various channels, transparently implementing suggested improvements, and promoting open dialogue to ensure transparent and effective communication.
- Develop and implement targeted retention strategies to proactively reduce turnover and retain key talent within the organization.

- Communicate opportunities for career development and advancement within the organization, contributing to increased job satisfaction and long-term retention.
- Implement regular and comprehensive employee engagement surveys to gauge satisfaction levels, with subsequent development of action plans based on constructive feedback.
- Conduct retention (stay) and exit interviews to gather insights from existing and departing employees and implement improvements based on their feedback.
- Regularly communicate and promote the value of recognition in reinforcing a positive organizational culture.
- Develop and implement recognition programs to consistently acknowledge and reward high performing employees and teams, fostering a culture of appreciation.
- Improve the milestone recognition program to celebrate employee milestones (birthday, anniversary, etc.)
- Develop team-building activities to strengthen employee relationships and foster a sense of belonging.

5. Performance Management and Succession Planning

- Establish clear roles, responsibilities, performance expectations, and metrics for each position, promoting accountability and goal alignment.
- Develop a goals and performance review program to facilitate meaningful, frequent conversations between employees and supervisors, promoting continuous improvement and professional development.
- Promote a culture of continuous feedback by implementing regular check-ins between employees and managers to provide a platform for open communication, feedback, and goal alignment on an ongoing basis.
- Establish a formalized process for addressing and resolving performance and behavior concerns promptly, fostering a culture of accountability and responsiveness.
- Establish a comprehensive framework for succession planning, ensuring a proactive approach to identifying and preparing a leadership pipeline.
- Strategically cultivate a continuous pipeline of emerging leaders by benchmarking skills and competencies, proactively identifying skill gaps, and to assist in implementing targeted professional development plans.

6. Communications and Employee Relations

- Develop a collaborative, proactive and transparent communication strategy to ensure timely and consistent dissemination of information across all levels of the organization.
- Ensure diversity and inclusion language practices and representation in all communication efforts, reflecting the organization's commitment to a diverse and equitable workplace.
- Establish leadership communication training to equip leaders with the skills of active listening, responsive engagement, respectful information conveyance, and the maintenance of open lines of communication with team members.

- Facilitate and actively engage in routine office meetings to effectively communicate initiatives, solicit valuable feedback, foster transparency, and create a platform for open and constructive communication among team members.
- Provide conflict resolution training to employees and supervisors to equip them with the skills to address and resolve conflicts professionally.
- Implement mechanisms to address and assist with team member issues or concerns promptly and effectively.
- Establish a mediation process for handling disputes and conflicts, promoting a fair and inclusive resolution.

7. Diversity, Equity, and Inclusion

- Champion and support the objectives and goals of the Otak DEI Strategic Plan.
- Cultivate an inclusive environment that values and celebrates differences, recognizing diversity as a fundamental source of innovation and strength.
- Conduct diversity training programs to promote awareness, inclusion, and cultural competence among all employees.
- Develop and implement programs to train leaders on inclusive leadership practices, emphasizing the importance of fostering an inclusive and diverse team.
- Collaborate with the DEI Committee to provide continuous learning opportunities with additional resources on diversity, equity, and inclusion to empower employees with knowledge and understanding.
- Develop, implement, and maintain policies and practices that ensure fairness and impartiality, proactively addressing any potential existing disparities within our workforce.
- Conduct regular equity audits to identify and rectify potential biases in hiring, promotion, and compensation practices.
- Regularly assess and refine our approach to guarantee equal opportunities for professional growth and advancement, ensuring a level playing field for all employees.

8. Employee Health and Well-Being

- Develop and implement wellness programs that encompass physical health, mental well-being, and overall employee wellness.
- Provide dedicated resources and support for mental health initiatives, including counseling services, information, and awareness campaigns.
- Maintain a confidential Employee Assistance Program (EAP) to offer counseling and support for employees facing mental health challenges.
- Encourage employee engagement in well-being initiatives through regular communication and awareness campaigns.
- Establish well-being committees or forums where employees can contribute ideas, feedback, and suggestions for enhancing well-being programs.

9. Technology and Systems

- Regularly assess, update, and/or implement human resource technology tools to ensure alignment with industry best practices and evolving organizational needs.
- Conduct regular process reviews to identify opportunities for automation and optimization, ensuring a lean and agile people services operation.
- Ensure the effective use of HRIS (Human Resources Information System) for data-driven decision-making, promoting a culture of evidence-based human resource practices.
- Foster partnerships with human resource technology vendors to stay informed about updates, new features, and emerging trends in the human resource tech landscape.
- Prioritize cybersecurity and data privacy compliance within human resource technology systems, implementing robust measures to safeguard sensitive employee information.
- Advocate for a user-friendly interface in human resource technology tools by identifying areas of improvement to enhance the user experience, to ensure accessibility and the ease of use for all employees.
- Collaborate with IT and other relevant departments to ensure that human resource systems work cohesively with other organizational tools.

10. Compliance and Risk Management

- Stay abreast of legislative changes and proactively update human resource policies and practices to align with evolving legal requirements.
- Participate in industry forums and conferences to network with professionals and gain insights into compliance trends.
- Develop and enforce policies and procedures to systematically identify, assess, and mitigate human resource-related risks, fostering a risk-aware organizational culture.
- Collaborate with legal experts to ensure policies address current legal nuances and potential risks.
- Conduct regular compliance audits to ensure human resource practices align with current laws and regulations, identifying and rectifying any non-compliance issues promptly.
- Establish and regularly review internal controls within people services processes to minimize the risk of errors, misconduct, and non-compliance.
- Implement ongoing training programs for employees to educate them on relevant labor laws and compliance requirements.
- Develop accessible resources (such as handbooks, policies, etc.) to ensure employees have easy access to information regarding their rights and responsibilities.
- Maintain thorough documentation and record-keeping practices to demonstrate compliance with labor laws and regulations.
- Implement a centralized system for record-keeping, ensuring accessibility and transparency in case of audits or inquiries.



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