



Inclusion Quick Start Playbook

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Overview

This quick start guide is designed as a structured approach for launching a workplace Inclusion program. Before getting started, let's level set the difference between Diversity and Inclusion in the workplace.

Diversity is the mix of people with different characteristics within an organization. The characteristics include physical, psychological, and social differences. Some common indicators of Diversity are race, gender, sexual orientation, ethnicity, age (generation), socio-economic background, religion, and education.

Inclusion occurs when employees bring their authentic selves to the workplace and are treated fairly and respectfully, have equal access to opportunities and resources, and can contribute fully to the organization's success. Employees feel a sense of belonging and value.

It is important to note that launching an Inclusion Program is not a box that you will check off as complete. Truly transforming your company to be more inclusive takes continual effort and requires adoption at every level within the organization.



**“Diversity is the mix.
Inclusion is making
the mix work.”**

ANDRES TAPEA

SECTION 1

Business Case for Inclusion



As noted by Inc.com, organizations with inclusive cultures are 2 times as likely to meet or exceed financial targets, 3 times as likely to be high-performing, 6 times more likely to be innovative and agile, and 8 times more likely to achieve better business outcomes.

There are a multitude of reasons that a company-wide focus on Inclusion makes not only practical sense but also, business sense!

As Catalyst.org explains, having a business case has grown out of a need to explain, especially financial benefits, of something that cannot be proven to cause an impact but rather can correlate to impact. Inc.com notes, "the business benefits and the outcomes of an Inclusive organization – fairness and respect, value and belonging, safe and open, and empowerment and growth – should be compelling enough to push forward. At some level, a company and especially its leadership, either gets it or doesn't.

There are specifics however, that have been demonstrated within Inclusive organizations:

- Increased creativity and innovation
- Higher customer acquisition & retention
- Better talent acquisition & retention
- Higher levels of compliance
- Higher job satisfaction, especially among staff of color
- Lower turnover
- Higher productivity
- Higher employee morale
- Improved problem solving throughout the organization

Any of the above can be impacting to the financial outcomes of a company despite not necessarily being the targeted reason for striving for an Inclusive organization.



SECTION 2

Tracking the Journey

WHAT DOES GOOD (OR EVEN “BETTER”) LOOK LIKE?

It can start with more simple addressable areas such as meeting behavior, recognition of holidays across religions, and extend to the more complex promotion and periodic workforce review policies as well as modifying the company’s own “corporate culture”.

Because Inclusion can be more invisible as doing well in this area means the workforce “feel” that sense of belonging and of being of value, metrics to show progress are all the more relevant. The absence (or reduction) of negative incidents that can make the workforce feel excluded as well as the increase in the perception and feeling of participation, inclusion, etc are key metrics gained through periodic check points. Organizations that excel at Inclusion have systems and processes to continuously collect feedback and act on it. Continuous improvement is an on-going goal measured by metrics.

Ultimately, what “good or better looks like” for your company may be distinct from others especially based on your starting point although the fundamentals of having your workforce feel they can be their authentic selves within the company and, be valued and respected are the same.

While the Diversity in the workforce can be the responsibility of hiring managers, leadership and even corporate culture, Inclusion should fall to everyone in the company. Managers and Leadership might create the policies and practices; everyone has a role to play in voicing concerns, improving areas of challenge. However, everyone also has to be enabled to play this role and, a company, whatever size, committing to a journey of Inclusion, opens the door for this.



The journey towards an Inclusive workplace must be addressed at all levels and across all functions as well as tenure.

CREATING THE BASELINE

Because Inclusion is a relatively subjective measure, it can be challenging to create a baseline. Surveys, focus groups and one-to-one conversations are all good ways to create that baseline, with surveys being most effective.

Surveys are a great tool to collect unbiased information. Survey Monkey® (<https://www.surveymonkey.com/mp/diversity-and-inclusion-guide/>) has several prebuilt surveys for measuring where you are today and periodically re-measuring to track progress. They recommend beginning with a survey on Diversity to establish the organizations' current demographics then a second survey to determine if employees of all backgrounds feel included. Be sure to collect diversity data within the Inclusion Survey so the data can be readily analyzed. In general, people in leadership roles may assess Inclusion higher than individual contributors so segregating by job grade as well as diversity characteristics will provide the most insight.

Another tool that can be highly effective accompanying the initial survey is focus groups. SHRM® (the Society for Human Resource Management, provides a great guide for conducting effective focus groups <https://www.shrm.org/>). It includes detailed steps for preparing, conducting, and analyzing the results of the activity. Sharing a clear intent, session structure as well as session ground rules in advance enables participants to prepare their thoughts. Invest the time up front to ensure questions are intentional for collecting information relevant to Inclusion. Most importantly, select facilitators who are approachable and viewed as un-biased. The focus group should reflect an intersectional mix as is possible.

Many companies will use a combination of surveys and focus groups to collect baseline data. The Survey Monkey® template focuses on measuring Objectivity, Growth Mindset and Belonging. You may elect to start with a survey and based on the results host a series of focus groups to get into more detail.

Regardless of the measurement technique(s) you employ, be open minded to the results. Be prepared as you most likely will not like to hear what the team is saying. Listening without filtering is critical to the success of your Inclusion Program.

Once you have collected the data, analyze it. With the survey, it is fairly easy to slice and dice the data and categorize the comments. For the focus group, data analysis takes a little more time and can be completed by an individual or as a group, preferably a cross functional, diverse group. Review all of the results and determine if the feedback is positive or negative so you can begin to divide the information. Next, look for common themes and group them into categories. Identify where your highest concentration of feedback lies and assess how the feedback aligns to your goals.

While completing these exercises, be sure to keep in mind the outcome you are looking to achieve – an actionable plan to improve Inclusion. Once you have completed your analysis, prioritize the target areas and develop your action plan. You may revisit this with your focus groups for validation. Share with leadership and get firm buy in, then communicate, communicate, communicate. Use the “rule of seven”, i.e. people generally have to hear a message seven times before they will internalize it.

And celebrate the successes!



ACTION PLAN & COMMUNICATION PLAN

Once a baseline has been created through a survey, targeted areas with specific action plans for short-term, mid-term and longer-term improvements should be developed. This Action Plan should be communicated. The workforce should be aware of what the company is trying to accomplish and why. Everyone should understand they not only have a role in sharing concerns but also in resolving them. Communicating the improvements (or lack thereof) against the plan will help drive ownership within the team. As with any change program, gaining evangelists and champions is key. Buy-in, participation, accountability are all components ofInclusion!

MEASURING SUCCESS

The Inclusion journey is not a singular event. It requires continual reinforcement and monitoring. As you execute your action plan, it is important to regularly measure where you are. Behavioral changes are required at every level of the organization. To measure success, be sure to set up a regular feedback loop. Establish a process to conduct periodic surveys and focus groups to collect information specific to your goals in an effort to measure your progress. Be transparent with what you learn, both positive and negative, sharing it broadly. Driving an Inclusive company takes everyone.

SECTION 3

Target Areas

Culture

There are a number of areas across a company that are key to Inclusion. Those are broken down below together with specifics that can be incorporated into an Action Plan.

CULTURE

Definition: A set of shared values, goals, attitudes and practices that characterize a company.

Examples of Cultural Inclusion in company Behaviors:

- Moving from a reward for a “know it all” culture to a “learn it all” culture
- Recognition and perhaps celebration of religious, ethnic holidays, festivals, etc
- Openly share perspectives without fear of embarrassment or retribution
- Promote a sense of belonging
- Ensure a sense of being heard
- More listening, especially by people in leadership positions
- Open-ended conversations
- Representation on projects not only across functions and levels but also economic status, gender, race
- A list of “exclusion behaviors” can be used to survey your organization to understand how often they experience the different types of exclusion. Results should be gathered and communicated followed by plans targeting key areas of exclusion offense.

An Inclusive culture is demonstrated by what's **not** acceptable in the workplace

Examples of Cultural Inclusion in Company Meetings:

- Assign rotating leads from different levels
- Ensure all attendees have a role and speaking opportunities, and a seat at the table with space to add value

Examples of Cultural Inclusion in Company Related Travel/Entertainment:

- Group outings of interest across the attendees
- Adapting restaurant choices/hours to dietary needs

Examples of Cultural Inclusion in Company Messaging:

- Consideration of who represents the company for example on the Website and internal newsletters/updates. How does the culture of the company come across?
- Inclusion in Branding

Examples of Inclusion in Company Policies/ Procedures / Practices:

- What are whistle blowing, anonymous reporting policies like?
- Work-life balance practices
- Return-to-work policies
- Life changes counseling (divorce, death, mental illness)
- Panels to review individuals for salary equity & promotion potential
- Cross functional and level project assignments for increased learnings, visibility

Examples of Inclusion in Rewards

& Recognition:

- Easily accessible app or other tools to highlight & reward model behaviors
- Company-wide announcements of winners in Town Halls or other forums, ensuring the awards are equitable across gender, race, etc.

Examples of Resource Groups for Gathering, Sharing:

- LGBTQ
- Ethnic groups
- Religious groups
- New mothers / fathers
- Returning mothers/fathers to the workforce
- Vets
- Disability

Examples of Non-Inclusive Culture:

- In meetings, all attendees do not have the opportunity to speak and even are discouraged from doing so
- "Brainstorming" sessions come with judgments of ideas
- Names of a diverse workforce are not pronounced correctly
- Omitting recognition of important holidays for parts of the workforce (For example, Diwali, Hanukkah)

When we take the time to listen and embrace what is both common and different, we create an inclusive culture and stronger company.

Leadership

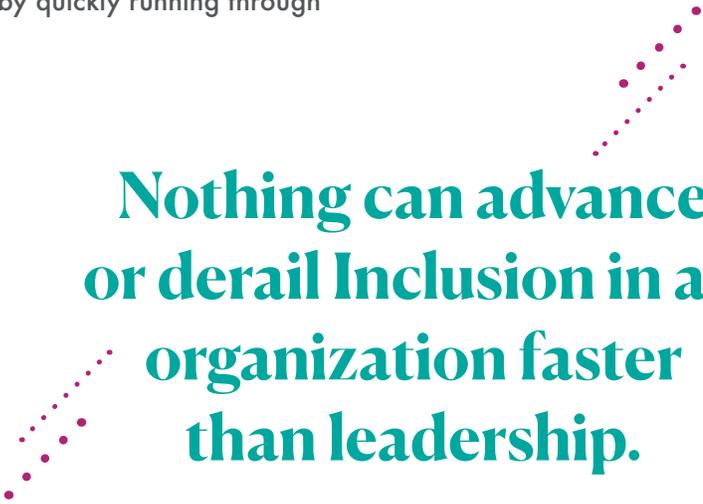
Modeling desired behaviors is key to driving changes in any area. In *Inclusive Leadership: From Awareness to Action*, the authors outline a roadmap for leaders to follow through the Inclusion journey. It is important to note while the leadership sponsorship and behavioral modeling is foundational, like any cultural change, it requires focus at all levels of the organization. Start with leadership but quickly filter the messaging throughout the company. Establish cross functional multi-level teams to carry out the vision and hold everyone accountable. Inclusive leadership is a team sport, it is not played by title only.

UNDERSTANDING BIAS

Virtually every text on Diversity and Inclusion features a section on bias, however the thinking has shifted over time. "...research now suggests that rather than being a personal character defect, bias is a common human phenomenon – we all hold biases of varying types and degrees." Understanding our biases and taking proactive steps to guard against them enables authentic Inclusive leadership. Research on bias is extensive. As you progress on your Inclusion journey, take the time to explore biases further. It is important to note that bias happens quickly in the brain as decisions/assessments are made by quickly running through long established neuro pathways.

Outlined below are some common biases that can impact inclusion:

- Implicit Bias
- Confirmation Bias
- Insider Bias
- Attribution Bias
- Over-Confidence Bias



**Nothing can advance
or derail Inclusion in an
organization faster
than leadership.**



GUARDING AGAINST BIAS

As previously stated, we could spend a lot of time on bias. As you launch your Inclusion Program, it is highly recommended you include bias training at all levels within the organization starting with leadership.

Some ways to guard against bias include:

- Demonstrate curiosity about your team
- Check for bias in yourself and others
- Flip it and test it
- Ask open-ended questions
- Check intent/impact
- Don't judge until you fully draw out the other person's point of view
- Request input
- Build empathy

BUILDING KEY SKILLS

Along with bias training, there are other skills that can be built (or refreshed) that would be helpful in an Inclusive journey for the company. Those include (but are not limited to):

- Relationship building
- Communication
- Motivation
- Feedback
- Teamwork

BECOMING A CHAMPION

In every organization you will find team members that are passionate about driving an Inclusive culture. If your organization is lacking an Employee Resource Group (ERG) that focuses on Diversity and Inclusion, that would be step one. Find your champions and allow them freedom of establishing an ERG. The leaders can establish and promote the Inclusive agenda and recruit others to participate. The champions should be recognized for their contribution and the organization should celebrate the impact the champions have made.

An Inclusive Workforce

There are policies and programs that can promote an Inclusive workforce.

Examples of Workforce Development

- Paid Higher Education programs
- Sponsorship for technical skills training
- Mentor / Mentee Programs across levels, functions
- Shadowing opportunities cross roles/functions
- Succession Planning

Examples of Workforce Adaptability

- Flexible schedules for unique family situations
- Back to work programs, incentives
- Childcare
- Mental health, addiction coverage

Examples of Workforce Benefits

- Paid parental leave
- Paid public transportation
- Eligibility across all levels of the org for bonuses
- Paid day off for voting

Examples of a Non-Inclusive Workforce

- Breastfeeding new moms do not have access to a private place to use a breast pump
- Team members that require an emotional support companion cannot have one in the workplace
- New Fathers do not have access to paternity leave
- New Parents do not have access to maternity/paternity leave for an adopted child
- Those who chose to are not able to have a respectful place for prayers
- Workplace policies around permissible clothing, hairstyles, tattoos, etc are not updated nor reflective of the workforce

How to Turn Non-inclusive Business Events into Productive Inclusive Engagements

A CLIENT DINNER MEETING

Targeting Inclusive behavior within company can also carry itself forward with clients. Showcasing the character and the culture of an Inclusive company can help clients to learn both about the company and, even possibly how they could do things. A simple example of this comes in the planning of a Client Dinner.

It's entirely possible and probable having a client dinner take place at a loud restaurant that caters to few food types with assumptions of a lot of alcohol drinking has been a part of the business experience for many. There are ways to encourage a different experience for all.

- Choose a restaurant with an extensive menu with options for those with allergies, dietary restrictions
- If the dinner is meant to be a meeting versus entertainment, choose a restaurant with a quieter environment or at least a less "party" scene to be able to talk
- Specifically order water or other alternatives for the table so there isn't the feeling of pressure to have alcohol or keep up
- Discuss the seating beforehand so the Leadership aren't in one corner of the table unless that is the intention
- Be considerate about the timing of the dinner planned for any participants that are on different time zones (may have jet lag).

NAVIGATING COMPANY ENTERTAINMENT ACTIVITY

As part of a company-wide new fiscal year kick-off meeting, the planned entertainment activities included golfing and a trip to the spa in a beautiful seaside location in Florida. The agenda included meetings all day and then half day "fun" events. There were two entertainment activities – those who golf and those who would go to a spa. And the assumption was the men were golfing and the females in the company were going to the spa. They were taking place over the same time period so, you couldn't do both but had to choose. When I chose golf, it was clear I was disrupting the assumed flow of where each group would fall – males would golf and females would go to the spa. And because most of the company leadership was male, then most of the group golfing would have access to the leadership and, those that went to the spa would not.

A lot of things are wrong with this set up, especially looking at this in 2021 (even though the above took place just a few years ago in 2018). Some ways to course correct this could be:

- Select a variety of activities that promote mixing of team members and, if possible, schedule them at varied times
- Possibly offer golf lessons or some sort of "beginner" level of activities so team members can participate even if they aren't skilled
- Ensure leadership divides itself across the activities to promote engagement with all team member levels
- Never make assumptions of which group should be doing which activity. If the organizers see just one group signing up for one activity (such as only males, or only the sales team, or only the group from a certain city), cross promote purposely.

SECTION 4

Success
Story



CELEBRATING DIVERSITY AND INCLUSION IS CORE TO INSIGHT'S VALUES

Since 2015, Insight Enterprises has worked diligently to establish a culture of innovation as it has expanded from a traditional role as a hardware/software reseller into an end-to-end solutions integrator capable of guiding everything from a client's day-to-day IT needs to full-scale digital transformation. Organic growth and several acquisitions have doubled Insight's workforce globally to 11,000 teammates, creating a profound lineup of IT talent that now includes more than 2,700 deep technical experts in specialties like cloud, data center, mobile applications, digital collaboration, the Internet of Things, artificial intelligence, and consulting services for organizational change management. Early in its own transformation, Insight recognized how diversity goes hand in hand with innovation.

"Diversity is more than just gender, skin color or cultural differences. What we're really seeking is diversity in thought," says Michelle Reaux, human resources director, who leads the Diversity, Leadership and Organizational Development program at Insight. "When you bring people together who approach things in their own distinct ways, the result is new inspirations and better ideas that make your team stronger and add greater value to what you can deliver to clients."

Establishing a more diverse workforce was integral to Insight's evolving purpose, starting with advocacy from executives and gaining support from teammates at all levels. Buy-in began with redefining the company's core values with three simple yet powerful attributes: hunger (to learn, explore and grow), heart (taking care of each other) and harmony (uniting different skill sets and perspectives to common goals). The values are intended to be memorable, but more importantly, actionable every day.

Three years ago, Reaux's team was asked to start a dedicated diversity and inclusion program that extended beyond recruiting and diverse hiring practices. The team built a three- to five-year business case with three key priorities:

1 CREATE TEAMMATE RESOURCE GROUPS

Giving Insight's diverse groups a platform to promote understanding of cultures that have traditionally faced challenges or been overlooked in the workplace was critical. Insight created a grassroots Teammate Resource Group program, encouraging likeminded teammates to lead groups of any kind promoting diversity, professional development, personal growth and innovation.

To date, eight unique groups have formed with participation by more than 1,000 teammates across North America. These support networks include: Afro-Professionals and Allies at Insight, InsightABLE (for people of all abilities), Insight Stands Out (supporting LGBTQA+), Unidos With Insight (celebrating Hispanic and Latino cultures), and Women With Insight; plus the Digital Innovation Diversity & Inclusion Committee, emphasizing hiring and growing technical expertise from a wide variety of backgrounds at Insight's 10 U.S. Digital Innovation offices. Two new resource groups, for military veterans and in support of its Asian and Pacific American/Canadian teammates, currently are being launched.

Each group's charter supports at least one of the following objectives to promote Insight values: support a diverse workforce, support Insight business objectives, and promote a respectful and inclusive environment.

"The simplest rule is everybody is invited. You have people that personally identify but you also need allies supporting and joining a cause who are passionate about making a difference. The idea is to share with everybody," said Reaux.

Recently, to further unite resource group missions, a mentor program was implemented in which teammates looking to develop new skills are paired with a leader from another group. The cross-mentorship encourages professionals to engage with peers they otherwise might not typically interact with, helping expand perspectives.



2 ALLYSHIP AND LEADERSHIP TRAINING

Eliminating unconscious bias in the workplace has come in the form of training curriculum developed in-house that all Insight managers and above undertake, and which is available to any teammate on a voluntary basis. Other courses focus on allyship and inclusive leadership. Modules of these courses are now being weaved into Insight's Aspiring Leadership program for teammates being considered for managerial roles.

"We have an incredible leader, Sarah Mpenza, who we brought on exclusively to kickstart and drive our Diversity and Inclusion program. She has done a lot of research to develop our allyship and unconscious bias training that's facilitated as a powerful, two-way conversation with our teammates rather than talking at them. She's modified the training based on feedback and, because these are topics that people are really passionate about, people are always very willing to share their opinions – it allows for education on both sides," said Reaux

3 BE A BEST WORKPLACE

A final component to growing diversity and inclusion has been an emphasis on applying for "Best Places to Work" corporate recognitions.

Besides showcasing Insight's brand as an employer of choice, Reaux says the greatest value in going through rigorous nomination processes is learning where the company is deficient and measuring progress annually. This, coupled with Insight's own Teammate Pulse Surveys, can provide valuable key performance indicators and employee feedback, which company leaders take to heart and actively address.

Reaux pointed to Insight's score this year of 95 out of 100 on the Human Rights Campaign Foundation's 2021 Corporate Equality Index, the nation's foremost benchmarking survey and report measuring corporate policies and practices related to LGBTQ workplace equity. When Insight first sought a rating in 2019, its score was 60. To improve, Insight addresses weaknesses noted in the annual assessment, such as the need for formalized non-discrimination policies.

"For diversity and inclusion to succeed in an enterprise, you have to be willing to have the hard conversations and be open to change. We do this often with our teammates to validate what we're doing well but understand the things that maybe we aren't doing yet or could be doing better. We've worked hard, in the last three years especially, to establish that open dialogue with our teammates and ensure their voices are heard," said Reaux.

Start your Journey!

This playbook is intended to provide a pathway to start and/or accelerate your journey towards a more Inclusive workplace. It is meant to dispel any thoughts there must be a structured program or business case before anything can be done. Immediate actions can be taken, however small, while also determining the baseline with goals and developing and

executing short-term, mid-term and longer-term action plans. And remember, it's not only about the right things to do for the workforce to lead to a higher performing and innovative organization. It's financially beneficial as well!

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FOOTNOTES

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