



## Diversity & Inclusion

Global Challenges and Opportunities

# Council Perspectives™

The Conference Board council members are among the most experienced and savvy executives in the world. Their private deliberations consist of rich insights on the most pressing business problems of our time. With their permission we have decided to channel their energy and expertise and to give them a voice for their views. That “voice” is Council Perspectives™. This new piece will be based on sessions from selected council meetings, post meeting interviews, and other pertinent data. Council Perspectives is not intended to be a research report but rather a unique look into the minds of executives in top global corporations as they weigh in on highly selective and important topics.

# Diversity and Inclusion

## Global Challenges and Opportunities

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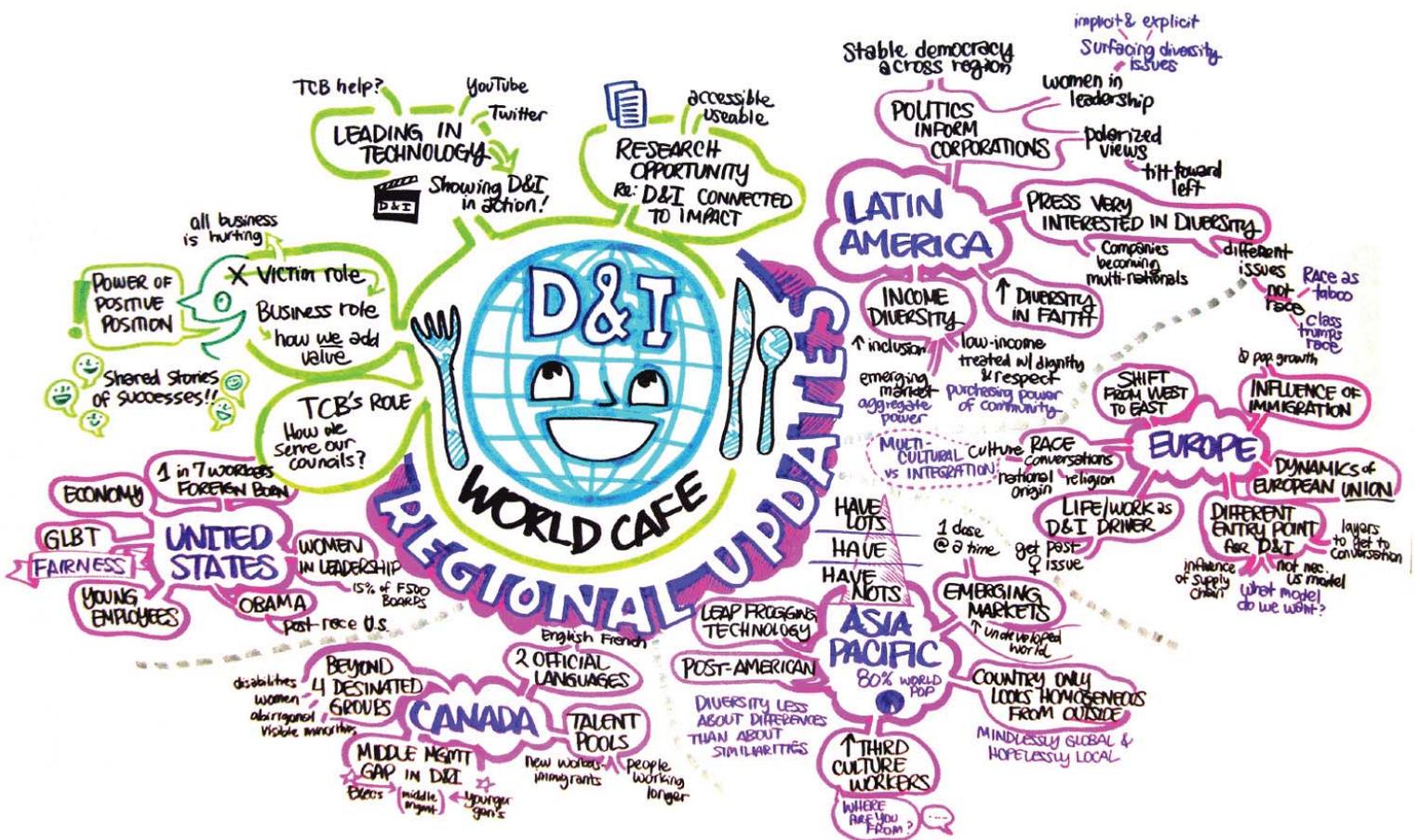
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To better capture the dynamics of collaboration among council members, The Conference Board employed a graphic facilitator to illustrate in real time the topics and ideas that flowed from the discussions. The graphics that accompany this report “map” participants’ conversations and reflect the patterns they saw and connections they created between ideas.

This “World Café” graphic, which is based on a series of breakout sessions, underscores the importance of cultural competency as an attribute for D&I professionals and highlights the subtle challenges and issues they face on a region-by-region basis when they try to implement a global diversity program.



Artist: Brandy Agerbeck of loosetooth.com ([www.loosetooth.com](http://www.loosetooth.com))

# Creating a Diverse and Inclusive Workplace around the World

For diversity and inclusion (D&I) professionals, the challenges of building a diverse and inclusive workplace—both region by region and globally—can be daunting. Participants at the global joint meeting of The Conference Board Diversity and Inclusion Councils spoke in broad terms about the need for a global mindset, and they offered specific suggestions for how to achieve it.

## Achieving a Global Mindset

There is no single globally accepted definition of “diversity.” Depending on the region of the world you operate in, it may connote issues of race, ethnicity, nationality, class, language, age, gender, sexual orientation, income, social class, physical ability, religion, or learning style. It may include all of these or none of them.

For a diversity and inclusion strategy to be truly global, D&I professionals need to understand the culture, politics, economics, and relevant legislation within the regions in which their businesses operate, all of which underscores the critical importance of being culturally competent. More broadly, they should concentrate more on the development of a global mindset and an international perspective and put less focus on exporting strategies that may work in one region but are irrelevant or ineffective in another. Creating a global movement requires diversity professionals to have experiences and interactions with people outside of their home country and their own comfort zone.

Taking diversity and inclusion globally is not about the export of specific programs, but about creating a movement, and infusing energy into a global corporate value system that includes diversity and inclusion as a fundamental concept. A critical issue that D&I professionals struggle with is how to keep the uniqueness of their national culture and still address the shared goal of embedding diversity and inclusion into day-to-day operations.

While each organization faces a unique set of challenges because of differing levels of D&I maturity, variances in corporate culture, and the number of countries involved, there are also crucial commonalities. Regardless of their industry or sector, all companies must address a lack of equity around the world; there is also still a great deal of

misunderstanding about how to define, leverage, and measure diversity and inclusion.

Diversity and inclusion programs that are initiated and managed from the headquarters country, especially the United States, often face resistance. They are routinely dismissed by employees as having no relevance to their business, and a “Made in USA” label often raises a red flag for international employees.

Given all of these factors, D&I professionals who seek to spread their message globally should keep the following thoughts in mind.

**Listen and don’t dictate** Avoid the common urge to tell people how to do it. Instead, ask them how they think it can best be done.

**Think about the terminology** Is it relevant for people outside the headquarters country? For example, the term “minority” is considered U.S.-centric and may mean little to employees outside of North America.

**Stop underestimating the complexity of being global** Even such basic tasks as gathering baseline data may prove difficult or even impossible. There are different legal frameworks that do not allow affirmative action or the ability to track age, race, nationality, etc.

**Establish a global mindset** It really is about a global way of thinking rather than a personal definition of diversity.

**Create a minimal framework that is driven by a global definition of diversity and inclusion but also highly localized** One analogy: while all versions of the television show *Who Wants to Be a Millionaire?* share the basic framework of the original version from the United Kingdom, each has been made locally specific through unique decisions about the value of the prizes, the nature of the questions asked, and the types of contestants that are selected.

**Be aware that solutions imposed from outside won’t always be effective** D&I executives should open a conversation that lets others come to the “aha” moment themselves. To be engaged, locals need to feel that they own the initiative.

**Look for progress, not perfection** How long did it take the United States to progress? Other countries and cultures can't be expected to get there in 24 hours.

**Challenge yourself** Incorporate what you can learn from the rest of the world into your own home country program. We all have a lot to learn.

## Regional Challenges

The different dynamics and definitions of diversity and inclusion around the globe have raised the profile of cultural competency and the importance of an executive's ability to do business effectively in any market, in any business, and at any time. Political and economic contexts inform what goes on in the corporate sphere in any geography. Presenters at the joint council meeting highlighted the subtleties that can have an impact on diversity and inclusion in a number of regions.

### Asia

**Economic differences** It's about the haves, the *have nots*, and the *have a lots*.

**Rapid technological change** In terms of technology, the region leapfrogged into the twenty-first century. Think of the Indian rice farmer with a cell phone.

**Regional differences** Asia needs to be dissected on a country-by-country basis. Even sub-regional clusters have vastly different cultures with different D&I issues.

**A mobile workforce** Across all regions, the workforce is globally aware and increasingly mobile. In fact, there is a reverse brain drain from the West to the East.

**"Post-Americanism"** The region is moving on without the United States and is proud of it, which can have an impact on the implementation of a D&I program seen as originating in the United States. America is no longer the country that prescribes behavior.

**Corporate culture versus national culture** Japanese women, for example, often join multinationals because they believe they will be more respected and appreciated than in a Japanese company bound by traditional Japanese behavior and attitudes.

**Communication patterns** Getting people who live and work in the region to support diversity and inclusion

efforts is a challenge, but if you don't know what an East Asian is thinking, you probably didn't ask. The skill is in asking the right question and perceiving the unspoken rules (e.g., the decision maker is not the one who talks the most; it is often the one who talks the least).

### Canada

**The Employment Equity Act** The purpose of the Act, which was passed in 1986, is "to achieve equality in the workplace" for women, visible minorities, people with disabilities, and members of aboriginal communities. Unfortunately, the act doesn't cover the country's LGBT population. Also, women aren't advancing as fast and as far as expected.

**Corporate social responsibility (CSR)** CSR is an increasingly important factor for employee engagement.

**The integration of D&I into business practices** Diversity and inclusion cannot be a stand-alone initiative. The current focus on the bottom line also means that attention has been taken away from diversity and inclusion.

**Middle managers** These leaders often do not see the value of diversity and inclusion.

**Additional challenges** Problems associated with having two official languages, the fact that a forecasted talent shortage is not occurring, and the difficulty of collecting data on newly arrived immigrants and employment equity.

### Europe

**A shift away from the West** As Western European markets become more mature, the immigration flow out of Eastern Europe is reversing, causing a labor shortage in some Western European countries.

**Birth rates** Several Western European nations have dipped below replacement level for births.

**Gender** This is an issue in the region, but not for all countries. Internal regions are also very split on this issue.

**Race** Again, the importance of race as an issue varies from country to country, often depending on the history of immigration in each nation. In some countries, the debate is more about national origin or language issues,

while in others the treatment of locally born ethnic minorities is the hot topic.

**Resistance to D&I programs** U.S. D&I programs are typically revised for local conditions, but that is changing because of resistance and relevance. Europeans often dismiss U.S.-centric. D&I programs based on gender and race.

**Consumer diversity** In Europe, diversity and inclusion is more about internal talent and less about consumers, but that is changing.

**Market differences** Each geographic market in Europe represents a unique entry point for diversity and inclusion. The different national laws and cultures make it a minefield.

## Latin America

**Political context** Democracy has grown across the region virtually uninterrupted during the last 25 years or so. Latin America also has two sitting presidents who are women—Michelle Bachelet of Chile and Cristina Fernández de Kirchner of Argentina.

**Race** This is still a difficult topic to talk about. As more and more Latin American companies become multinationals, the focus tends to shift to gender and generational issues.

**Religion** While 80 percent of the population is Christian (predominantly Roman Catholic), Evangelical and Pentecostal movements have taken hold in the last 15 years, making this a growing diversity issue.

**Income diversity** When it comes to inclusion, there is rampant discrimination and prejudice against low-income people. Ensuring that low-income workers are treated with dignity and respect would be a revolutionary step. Even if the income gap is not addressed, greater respect would be a step forward. Still, despite low incomes, the region is a growth market, and 250 million low-income Latin Americans have purchasing power of \$120 billion.

**Class** This issue still trumps race in Latin America.

## United States

**Demographics** The United States is a first-world country with some hints of third-world demographics when it comes to poverty and birth rates in certain population sectors.

**Immigration** One in seven workers is foreign born, and 12.5 percent have master's degrees, compared to 8 percent of the native population, according to the U.S. Census Bureau.

**Women** According to Department of Labor statistics, women currently represent 46 percent of the total labor force, and 40 percent are working in management, professional, and related occupations.

**Multiple generations in the workplace** Baby boomers are staying on the job longer, which is creating a bottleneck and leaving Generation Xers and Millennials frustrated.

### Reverse discrimination

**Demographic shifts** By mid century, the United States population will be more than 50 percent non-majority. Who is the consumer of the future? Who are we selling to outside of our traditional customers?

**A “postracial society”** With the election of President Barack Obama, some are saying the United States has entered a “postracial” era, and diversity and inclusion doesn't need to exist as a function.

**Lesbian, gay, bisexual, and transgender issues** These concerns are increasingly receiving more attention.

## Going Global at Diageo

Diageo is a global leader in the premium drinks market and trades in more than 180 markets, employing more than 22,000 people around the world. Headquartered in the United Kingdom, its shareholding is about evenly split between the United Kingdom and the United States. At the 2009 Corporate Diversity and Inclusion Conference, Cherie Sheridan, director for learning and development at Diageo, North America, Inc. provided insight into the challenges and strategies needed to launch a successful diversity and inclusion program on a global scale.

Diageo's diversity and inclusion initiative was founded on the principle "that every employee has potential and that by creating the conditions for them to grow will improve Diageo's business performance." Launched in North America in 2007, this program was expanded globally to all people managers in 2008, beginning with a pilot program in London that included participants from Africa, Brazil, UK, Spain, and Sweden.

The drivers and goals for the Diversity & Inclusion program have always been aligned with Diageo's broader performance objectives and contribute to business growth. The drivers and goals included:

- Changing demographics
- War for talent
- Increase employee engagement
- Create an authentic work environment
- Consumer insights
- Increase our support to minority suppliers
- "Simply the right thing to do"

## Developing the program

Diageo learned valuable lessons through the design, content development, and delivery process of the initiative that are relevant for any company wishing to embark on a global diversity and inclusion journey. Among them:

### Design

Form a global planning team:

- Conduct interviews with primary stakeholders in advance to create relevant case studies and opportunities for discussions

- Ensure that you understand any legal obligations and compliance issues that may affect the material being presented
- Be aware of significant events taking place in the country
- Pay attention to the fact that the organization's culture may be stronger than some aspects of the country's culture
- Provide opportunities for leadership to prepare their lift/elevator speeches
- Educate the team
- Choose an external consultant for subject matter expertise
- Establish global definition of diversity and inclusion
- Create a Global Facilitators Network
- Communicate

### Content

- Simulations: adjust simulations to reflect cultural norms that will likely be present in the audience.
- When defining multiculturalism or diversity, provide opportunities for participants to define what they see as the primary challenges within their corporate culture.
- You must have examples of success factors that can be directly tied to diversity of perspective, people, approaches, etc., which can be presented to the group to build the rationale for the business case.
- When questions, conflicts, and concerns arise that are in stark contrast to cultural norms, it is important to link all learnings to the core values of the company.

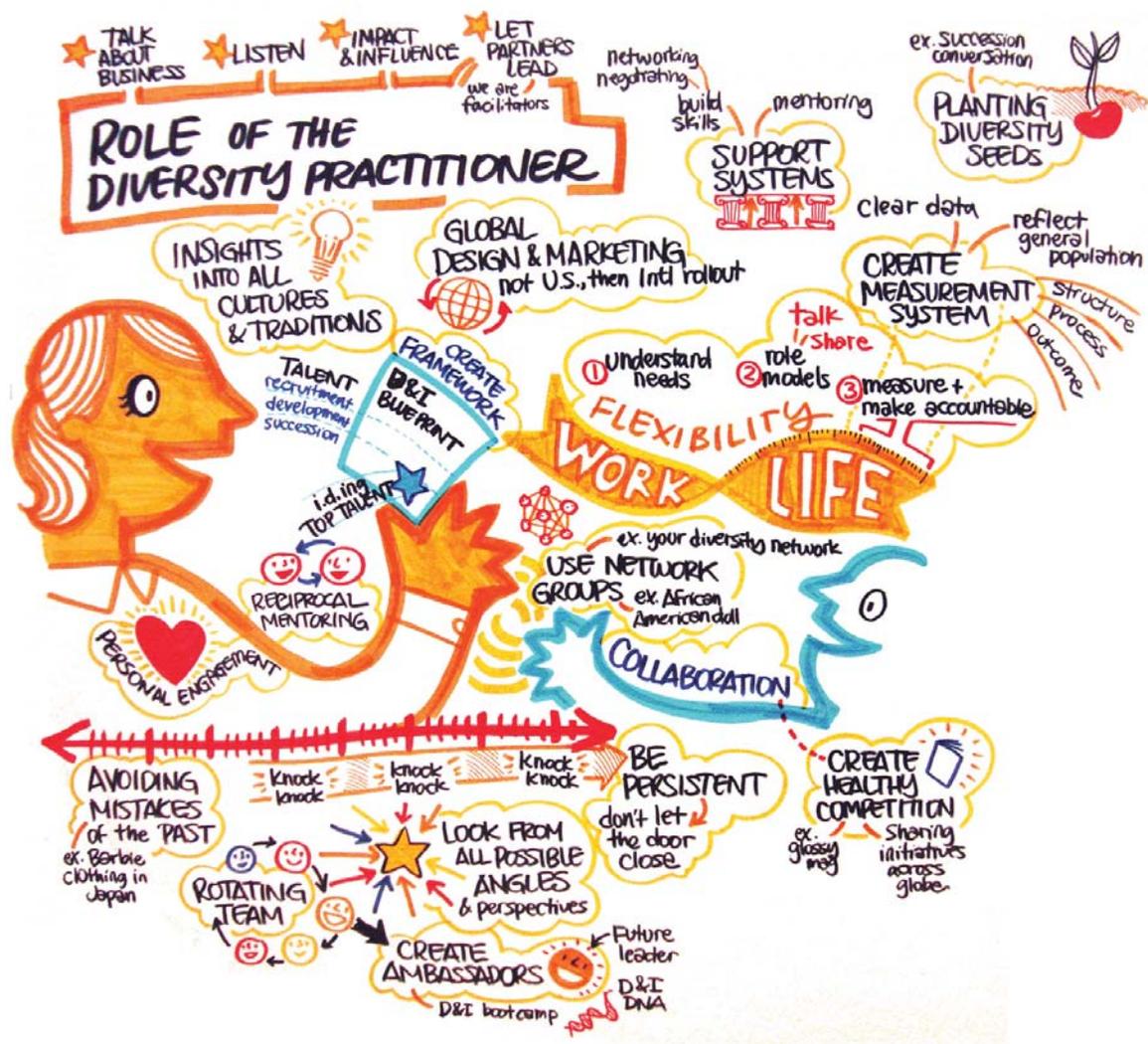
### Delivery

Pilot Programs: outside of the United States

- Language impact: Be mindful of the fact that when people are learning in a language that is not their native tongue, it requires a far greater degree of concentration and energy to successfully navigate the materials.
- Provide opportunities for action planning.
- Materials: Reduce the amount of material you have in your headquarters version, because everything will take much longer due to language, translation, etc.
- Use multicultural teams to deliver messages.

In addition to the role of the D&I professional, the diversity and inclusion function is changing due to rapid technological advancements, globalization, immigration, increased demand for skills and education, and an aging workforce in a large part of the world. The emphasis today is on cornering new markets, building effective and efficient global teams, and managing brand reputation. Clearly, the twenty-first century D&I practitioner who will embrace this more public, decidedly strategic role will require a challenging new set of competencies.

This graphic captures attendees' ideas about the evolving role of the diversity practitioner, the new competencies required, and both the strategy and the tactics needed to implement a global D&I program.



Artist: Brandy Agerbeck of loosetooth.com ([www.loosetooth.com](http://www.loosetooth.com))

## Building an Effective D&I Function

Although participants spent significant time examining the external challenges to the creation of a diverse and inclusive workforce, their discussions also addressed the *internal* challenges diversity and inclusion professionals face. Through these conversations, participants were able to identify four areas that are critical to ensuring that the D&I function has impact and adds value:

- 1 Ensure D&I takes a business perspective
- 2 Link D&I to other functions across the organization
- 3 Build a pipeline of future D&I leaders
- 4 Sustain momentum during tough economic times

### I Taking a Business Perspective

The days when D&I programs could get by as “add-ons” or as simply “the right thing to do” are gone. Executives want to know that D&I professionals understand the business and can customize a diversity strategy that helps the organization and specific departments accomplish their strategic goals. Leaders also want to have confidence that D&I executives can deliver a plan that works for the whole company.

#### D&I *is* a business function

One fact the current global recession has taught executives is that there is nothing like an economic downturn to sharpen company focus and priorities. Many organizations are waging battles on multiple fronts. In addition to an external conflict with competitors for markets, capital, and, in extreme cases, survival, there is an internal struggle between functions for attention, resources, and recognition.

Another certainty that is emerging from the economic rubble of the current recession, which is the worst in two generations, is that the role of and the conversation about diversity and inclusion has changed for good. And, according to many professionals in the field, it’s about time. The diversity and inclusion role is now, more than ever, a business one and the function needs to operate accordingly if it wants respect, resources, and the attention of potential partners and collaborators. To be integrated into business functions, D&I executives must not only align themselves and their function with corporate strategy, they must also strive to influence that strategy.

#### Wanted: a new model of D&I leadership

Persistence and passion are the recognized hallmarks of diversity executives, but a different business environment and the demands of being a global business partner require more than these two admirable qualities. Today, change management is at the heart of the D&I function, and it is mandatory for the alignment of D&I priorities with business objectives. With corporations developing new directions and strategies every three to five years, the ability to redirect change—something D&I executives do all the time—can support evolving business objectives. Diversity executives should recognize this quality and flaunt it within the organization.

D&I executives also need to move away from measuring their worth by “activity.” The mindset needs to be about strategy and impact. You need to look at diversity and inclusion in a vastly different way. It is a whole new ball game, and if you don’t change your game, you will simply not be invited to play. Stop focusing on “how busy you can be” and “making lists”; and instead place the focus on D&I’s impact on the business, both in the short and long terms. The case for diversity has to start with the needs of the company, an understanding of how the customer is changing, and the ability of D&I executives to meet those needs down to the business unit level.

#### A new role for D&I executives: business strategist

As part of the shift in the definition of the diversity and inclusion function, D&I executives must become solutions providers. They need to be able to help their companies think more broadly when they enter new markets, build high-functioning global teams, and look for ways to enhance corporate brands and reputations. If the function can prove its ability to meet important challenges, senior management and business units will begin to consider the D&I department a strategic partner. This is already happening in those companies where the value of D&I has been clearly formulated and publicly stated.

In the role of business strategist and consultant, D&I executives must clarify the definition of diversity and inclusion within their organizations. More important, they must learn about the business from the perspective of the managers they hope to convert. The basic lesson here is that you must know the business before you expect business managers to understand the value of diversity. An enhanced understanding of the entire organization will help D&I professionals clearly and specifically communicate their plans and define what winning means for the business in practical terms. Useful questions to ask during this learning phase include:

- Are we valued in our business organization for what we contribute to the bottom line?
- Do we have a solid value proposition and business case that can be measured in terms C-suite functions understand? Are we delivering on it?

By gaining a genuine understanding of how business units operate, D&I executives can change the perception that diversity and inclusion is an imposition and reinforce how it has to become a part of the corporate culture. This is especially needed at the business unit level, where resistance to D&I initiatives can be higher.<sup>1</sup> Major projects should include the integration of diversity and inclusion into the company's operations so that it influences all aspects of the organization and the creation of a common organizational language around diversity and inclusion. If the company's D&I ethic becomes part of day-to-day operations, it never leaves.

### The importance of courageous communication

Courageous conversations, crucial conversations, courageous communication, critical interventions—regardless of the term, D&I executives must tackle the tough issues, ask the hard questions, and force organizations to confront weaknesses or address subjects they would otherwise choose to avoid or ignore. Their task is to move beyond the paralyzing cordiality that sometimes infects companies, especially in good times, to address issues

about performance and relevance that run the risk of offending the powers that be or creating the impression that the D&I function is not a team player. Diversity and inclusion executives must also reach across functions to engage individuals who may have previously found excuses not to talk about diversity and inclusion. Courageous communication means finally tackling those issues that are frequently talked about but never acted upon.

If D&I executives are to challenge the perspectives of others, they must be willing to subject themselves to the same rigorous analysis. D&I leaders should consider the times when they were able to speak out and the times they did not. As a D&I champion, you simply cannot stand by when you see things that are not inclusive or see people making decisions that are counter to the values of your corporation. Don't assume that your reality is someone else's reality. Be courageous and speak up. Challenge others' perspectives.

### Tips for Expanding the Role of Diversity and Inclusion

D&I executives should:

- Be flexible, aware, and resilient
- Be good listeners
- Actively manage risk, acknowledge the economic downturn, and work to get people on their side
- Be practical and make business sense
- Understand and appreciate the current crisis
- "Select and direct" and focus on the human element
- Always relate D&I to the business and emphasize ties to business outcomes
- Persuade partners that their business needs are driving the agenda
- Maximize the function's role as a strategic talent manager

<sup>1</sup> For a discussion of the D&I role of middle management, see *Middle Managers: Engaging and Enrolling the Biggest Roadblock to Diversity and Inclusion*, The Conference Board, Executive Action 234, April 2007, which is based on discussion at a November 2006 meeting of the Diversity Business Council.

## Don't fight the system—work with it

In the past, diversity and inclusion was often viewed as a problem that needed to be fixed. Today, such a mindset will only make D&I that much harder to embed within the organization. With companies and CEOs demanding more engagement, more innovation, and more productivity, diversity and inclusion needs to be seen as part of the solution. And as D&I executives know, and other business managers are beginning to learn, you get better business decisions when you have diverse perspectives in the room.

D&I executives need to redefine diversity in a much broader context. Business leaders are all about innovation and growth, and D&I executives need to talk that talk. If you use the old language of diversity based on an outdated model of an emotive experience and qualitative measures, you are probably not aligned with the rest of the organization. If it is not tied to the business agenda, diversity and inclusion becomes “a nice thing to do.” If it does not translate into growth in the business it becomes a secondary priority. Alter the perception from cost center to profit center, tie diversity and inclusion to cost savings (higher retention rates), productivity gains (a more engaged workforce), and revenue growth (new markets).

## 2 Linking to Other Functions across the Organization

As part of its effort to demonstrate the real value of diversity and inclusion to an organization, the D&I function must partner or work directly with other departments and programs. D&I professionals at both the global diversity councils meeting and the Diversity and Inclusion Conference cited four key areas where a robust and business-focused D&I program can show its contribution to overall corporate success.

<sup>2</sup> Source: *2008 National Population Projections*, U.S. Census Bureau ([www.census.gov/population/www/projections/2008projections.html](http://www.census.gov/population/www/projections/2008projections.html)).

<sup>3</sup> Sources: *Euro-Mediterranean Statistics*, Eurostat, 2009, p. 24 (Italy, Spain, and Germany); *Statistical Handbook of Japan 2009*, Statistical Bureau, Ministry of Internal Affairs and Communications, p. 15 (Japan).

## Marketing: Offer insights into the needs of the new consumer

What is an essential role in today's corporation and economic environment? The answer often depends on the customer. Essential roles are those that connect to the customer, build relationships with them, and, in the end, add shareholder value. If diversity and inclusion is not operationalized to be part of essential roles in the business, then it will be on the outside looking in. If it's not in the annual operating plan, it is often considered nonessential.

Recent demographic and labor shifts give D&I a new opportunity to help organizations who are expanding their operations around the world. These developments are enablers of global growth. For example, according to national population projections released by the U.S. Census Bureau in August 2008, the U.S. minority population is expected to account for more than half of the total U.S. population by 2050, and their economic buying power will only continue to grow.<sup>2</sup> Birth rates in Italy, Spain, Germany, and Japan are all below replacement level, signaling a worsening labor shortage in the future.<sup>3</sup> India is projected to have 47 million surplus workers by 2020.<sup>4</sup> D&I executives of global companies offer unique insights that can help their companies develop a deeper understanding of these future markets and the behavior of customers in them. It is up to D&I executives to provide marketers with a perspective on why an insight is an insight. It's not just about how consumers shop, but rather how they live.

## Innovation: Act as a source for new talent

CEOs are clamoring for more innovation and are striving to build a culture of innovation within their organizations. The notion that diversity not only supports innovation, but can drive it, especially on an incremental scale, is held not only by D&I executives, but also by those charged specifically with the task of leading innovation. At a February 2009 meeting of The Conference Board Council on Innovation, council members repeatedly noted the importance of diversity to their function, especially in the formation of global innovation teams and the hiring of staff. One of the goals of the council is to get people within their organizations and their function more excited about the link between diversity and innovation.

<sup>4</sup> Source: *Tradeable Labor: A Tide That Will Not Be Turned Back*, The Boston Consulting Group, 2004, p. 4.

The diversity mindset is especially important in the hiring process. Members of the Council on Innovation said that companies should be open minded and adventurous when a candidate has a diverse or nontraditional background. They may not fit the existing mold, but they often bring different viewpoints that can lead to solutions others might not have considered. When it comes to innovation, you have to have disruptors—people coming from different angles, different mindsets and viewpoints, to be successful. It is part of the D&I executive's role to make sure those candidates are in the pipeline and are directed to the functions that need them the most. D&I executives must ensure that people with nontraditional viewpoints are involved in work teams throughout the organization and that these teams are open to mavericks.

### Employee engagement: Take the pulse of the organization

Employee engagement is defined as a heightened emotional and intellectual connection that an employee has for his or her job, organization, manager, or coworkers that encourages him or her to apply additional discretionary effort to work. There is clear evidence that employee engagement is related to performance and productivity levels at individual, team, and organizational levels. For example, research shows that companies with high employee engagement had voluntary turnover rates one-half that of average employers.<sup>5</sup>

The “inclusion” element of D&I is all about employee engagement and effective team building. Employee resource groups (ERGs) are a valuable tool for both increasing employee engagement and demonstrating the value of diversity and inclusion to growth and revenue. Companies that have made ERG members a prominent part of their organizations are able to offer employees the opportunity to be heard and make tangible contributions to the revenue line. ERGs should be leveraged as inputs into the marketing and design functions, and their contribution must be communicated across the organization. ERGs themselves should concentrate on adding value to the business and aligning their activities with business objectives. (For examples of successful ERGs, see “How ERGs Can Make a Difference: Reports from the Frontlines” on page 14.)

### The employer brand: D&I can help spread the word

Many companies do not know how to market themselves as employers. They undervalue the importance of the employer brand and are unaware of the potential contribution that diversity and inclusion can make to the impression that their company is an employer of choice in a global talent market.

Just as a corporate brand embodies a company's values and value proposition for customers, an employer brand establishes the identity of a company as an employer. Employer branding may be especially important for companies that face difficulties in establishing strong product brand images (e.g., organizations that sell their products or services are sold to other companies and lose much of their product brand identity before reaching end users).<sup>6</sup>

Unfortunately, the link between diversity and inclusion and the employer brand is often overlooked. Instead of leaving it to the communications and human resources departments, D&I executives need to develop their own “marketing plan” that outlines the function's contribution to being an employer of choice. The case for diversity has to start with the needs of the company, and one of those needs is an effective talent management program that hinges on a strong employer brand and an effective recruitment and retention strategy.

Companies that have successfully embedded diversity and inclusion and can demonstrate that it provides career opportunities for all its employees are able to leverage diversity and inclusion as a real differentiator in the talent marketplace. A strong employer brand, which includes a demonstrable commitment to diversity and inclusion, ensures that the talent needed for global growth will be available.

<sup>5</sup> John Gibbons, *Employee Engagement: A Review of the Current Research and Its Implications*, The Conference Board, Research Report E-0010, 2006.

<sup>6</sup> Nathan Ainspan and David Dell, *Engaging Employees through Your Brand*, The Conference Board, Research Report 1288, 2001.

## How ERGs Can Make a Difference: Reports from the Frontlines

Presenters at the annual Diversity and Inclusion conference held by The Conference Board cited numerous examples of how ERGs have helped identify and solve product, human resources, and marketing challenges.

- A Latino ERG at a large global food and consumer goods company provided valuable advice on introducing a successful product line from Mexico to Latino ethnic consumers in the United States. The U.S. version of the product line has been a great success from day one.
- A pharmaceutical company used an ERG centered on people with disabilities to identify flaws and offer suggestions about how to improve a medical testing and injection product, which provided insights that the development team had failed to consider in its original design.
- One company was baffled by the relatively rapid turnover rate of high-potential Asian employees brought to its U.S. headquarters. In many cases, the troubles surfaced after only a few months. The company's Asian employee ERG were able to identify a major issue, which was that the spouses of the new employees were having difficulty adjusting to living in the United States. The spouses found such basic day-to-day activities as grocery shopping or setting up doctors' appointments to be arduous tasks, and they also felt alone and isolated. After the ERG helped the company set up a program to help the spouses of newly transferred employees settle into their new homes, turnover rates dropped significantly.
- One company turned to its ERGs to assist in improving a chronic issue over the quality and accuracy of translation services for product and marketing materials. The employees were excited to get involved, and the initiative resulted in improved translations and a cost savings for the firm.

## 3 Building a Pipeline of Future D&I Leaders

A survey of attendees at the global council meeting found that 60 percent of participants had been in their current role for three years or less—a statistic that raises several questions:

- What is being taught to the next generation? Is there knowledge transfer so that future leaders can sustain the gains that have already been made?
- What will the fallout be if there is a failure to focus on knowledge transfer? Will this mean that the momentum gained over the past 20 years will be lost?
- Are current teaching methods and approaches relevant? Is the new wave of D&I professionals confused by what is being transferred?
- How do current D&I leaders transfer competencies to themselves? How do we develop these competencies in future D&I practitioners?

To keep the profession moving forward, knowledge must reside in the process and not in a single person. To that end, organizations must ensure that the institutional memory, the experience, and the knowledge of longtime D&I executives are effectively transferred to the new leaders. To help companies thrive and keep the momentum going, D&I executives need to focus on managing and transferring knowledge and adapt their programs to different learning styles. (*A Competency Model for D&I Practitioners*, a 2008 report from The Conference Board, lays out a comprehensive framework for developing future D&I leaders that has already been adopted by a number of leading companies. See “New Competencies for a New Era” on page 15 for a discussion of the framework's components.)

## New Competencies for a New Era

In 2008, The Conference Board published *Creating a Competency Model for Diversity and Inclusion Practitioners*, which details the results of a two-day meeting of members of three councils from The Conference Board: Council on Workforce Diversity, the Diversity & Inclusion Council, and the Diversity Business Council. The report details a new and unique competency model for D&I professionals in the twenty-first century. The model includes categories of like competencies, the competencies themselves, and behaviorally based definitions for each competency. One objective of the report is to help D&I professionals raise the profile of their function and their subject matter expertise, especially on a global platform.

To be used effectively, these competencies should be integrated into a company's business metrics. Organizations should ask how employees can use a competency to strengthen the business and achieve strategic business objectives. In some parts of the world, competencies may remain consistent, but the definitions and models may require some alterations for other regions.

### Global Diversity & Inclusion Competency Model

#### 1 Change Management

**Organizational Development** Understands and facilitates the change process

**Corporate Communication** Relays the full spectrum of inclusion

**Critical Interventions** Steps in to remove roadblocks when progress is impeded

#### 2 Diversity, Inclusion, and Global Perspective

**Cultural Competence** Understands and is fluent in multiple cultural frameworks

**Negotiation and Facilitation** Resolves cultural conflicts

**Continuous Learning** Commits to ongoing examination of biases

**Complex Group Dynamics** Manages across groups in the organization

**Judgment** Knows when to inquire and when to intervene

**Subject Matter Expertise** Conversant with industry best practices

#### 3 Business Acumen

**External Markets** Familiar with global and local trends in D&I

**Holistic Business Knowledge** Possesses a thorough understanding of the market and the business

**Diversity and Inclusion ROI (Return of Investment)** Able to express the bottom-line implications of D&I

#### 4 Strategic External Relations

**Corporate Social Responsibility/Government/Regulatory** Well-informed about external pressure points

**Strategic Alliances Leverages** external relationships with external partners

**Diverse Markets/Supplier Diversity** Seeks to create a network of diverse suppliers and organizations

**Brand/Reputation Management** Positively influences media and the marketplace

#### 5 Integrity

**Ethics** Acts as a voice for perspectives that are not otherwise represented

**Resilience** Pursues and achieves goals in the face of resistance

**Influence** Negotiates and persuades at all levels of the organization

**Empathy** Understands how to motivate and work with minority and majority groups

**Communication**

#### 6 Visionary & Strategic Leadership

**Diversity & Inclusion Future State** Acts as a catalyst for change

**Pragmatism** Works within business realities

**Political Savoir-Faire (at HR and Local Levels)**

Collaborates with other functional areas to maximize outcomes

#### 7 HR Disciplines

**Total Rewards/Talent Management/Organizational Development/Work and Life Balance/Training** Possesses relevant knowledge of all programs, policies, and best practices

**Compliance** Understands and ensures that all applicable laws, regulations, etc., are followed

**Employee Relations** Resolves conflicts and helps change the work environment in the face of challenges

*Source: Indra Lahiri, *Creating a Competency Model for Diversity and Inclusion Practitioners*, The Conference Board, Research Report 1420, 2008, pp. 11-18.*

## 4 Managing through the Tough Times

Dealing with a challenging economic climate requires D&I professionals to take a hard look at priorities and projects, sharpen their focus, and improve alignment with a company's overall business objectives.

### Maintaining momentum against strong head winds

A pulse poll of the 211 participants at The Conference Board Diversity and Inclusion Conference held in Chicago in May 2009 found that almost half (48 percent) of the respondents had had budgets cut in the preceding 18 months and just under a quarter (24 percent) had experienced staff reductions. But D&I executives who experience such reductions shouldn't take them personally. If cuts are being made to their function, they are likely happening to everyone else across the organization. The important goal is not to lose the momentum you have built within your organization for D&I programs and initiatives. And it's not all bad news: 19 percent of those surveyed at the conference had actually seen their budgets increase in the previous 18 months.

It has become a business cliché to suggest that turbulent times should be seen as an opportunity rather than a threat—admittedly, a difficult mindset to keep if your budget and staff has just been slashed. Still, attendees at the joint meeting of the diversity councils that preceded the Chicago conference described how the recession had forced them to take a hard look at priorities and projects within their own function. Even if the primary challenge is to just hold fast, the current environment does offer opportunities to introduce new processes, new perceptions, and new efficiencies within the D&I function. Yes, there are ways to do more with less, but you may actually want to do less with less and tackle fewer but highly prioritized and relevant initiatives and execute them at the highest levels.

### Balancing the short and the long terms

During the current economic downturn, it is important to balance long-term objectives with short-term demands. While the pressure to alter course can be enormous, the dynamics of the economy should not divert attention from the long-term benefits that diversity and inclusion brings to an organization. Council members identified some basic tactics that D&I executives can use to cope with the recession and maximize some of the opportunities offered by the downturn.

**Embed D&I deeper into the organization** An altered business strategy can present opportunities to make diversity an integral component of other functions and business units. The current downturn could be a blessing in disguise if it accelerates initiatives already underway or forces somewhat reluctant departments or individuals to quit stalling.

**Sharpen focus and alignment** One D&I executive's perspective shifted from a broad view of the diversity employment pipeline to a narrower one on how to align hiring (and retention) of leadership and high potentials with the company's new strategic priorities.

**Prioritize D&I work when budgets are tight** Do a few things well, not just several things halfway. Prioritize by impact and alignment to overall business strategies and commit to doing the few you do choose well.

**Renew and reinforce CEO/C-suite commitment** Obtain a reaffirmation of support with updated language that reemphasizes the CEO commitment to diversity and inclusion, even in the current economic environment.

**Reshape and refocus communication** The D&I function should not be excluded from efforts to increase transparency in communications. It should educate internal partners and external customers about the function. Celebrate successes.

**Emphasize the talent management role** Many council members noted that tough economic times often cause companies to lose focus on talent management. While the tactics for recruiting and retention may change, it would be a grave mistake to ignore key talent in the D&I function during these times. Some recommended strategies and tactics for good D&I talent management in the current environment:

- *Recruit new talent* Layoffs and cutbacks often make strong, experienced, and highly qualified candidates available in a number of countries and regions.
- *Build relationships for future recruiting* Companies should take this step even if they are not currently recruiting. Maintaining a strong employee brand and cultivating relationships will pay dividends when hiring starts again. Leaving the recruiting marketplace now may mean years to get reestablished when the good times return, which will leave companies that dropped out behind competitors who stayed the course.
- *“Re-recruit” existing employees and sharpen the focus on retention* There are several ways to do this, including building renewed excitement for the benefits of diversity and inclusion across the organization, recognizing the contributions and sacrifices of existing employees, and identifying new responsibilities for the talent that is retained. There may also be new opportunities for succession planning and appointments as reorganizations and restructuring occurs.
- *Leverage ERGs to sustain D&I initiatives* In addition to their business focus, ERGs should also consider how they can benefit the employee population and the community at large. ERGs can be a great way to use limited resources to provide multicultural marketing help, global support and input for D&I initiatives, and advocates who can act across geographies.



# Moving the Profession Forward: Metrics and Next Steps

What are the indicators of success for the spread of diversity and inclusion throughout an organization? How do you measure those indicators? The answers to these two questions, according to members of The Conference Board Diversity and Inclusion Councils, remain elusive. It is difficult to monetize the impact of such traditional

metrics as retention or employee engagement and to connect them directly to a company's bottom line. Determining a true ROI for diversity and inclusion is a work in progress. (See "The Perils of Measuring the ROI of D&I".)

## The Perils of Measuring the ROI of D&I

by Stephanie Creary

In the past 10 years, diversity and inclusion practitioners' use of scorecards to track representation, promotion, and turnover rates by race/ethnicity and gender has grown substantially.<sup>a</sup>

Building on the approach championed by Harvard Business School scholars Robert S. Kaplan and David P. Norton, D&I practitioners have created diversity objectives (e.g., "increase representation of women in the senior leadership ranks"), identified diversity measures (e.g., percentages of total senior leaders belonging to various groups), established targets (e.g., "on par with the percentage of women in the total workforce"), and created initiatives that focus on achieving these targets (e.g., instituting mentoring programs and rotational assignments, presenting a diverse slate for open leadership positions, etc.).<sup>b</sup> Many have also embraced Kaplan and Norton's "strategy maps" concept by illustrating the methods by which diversity strategy could be accomplished through innovation and learning, internal business, and customer perspectives.<sup>c</sup>

Notably, D&I practitioners have used scorecards and strategy maps to hold senior leaders accountable for achieving diversity targets, with some companies basing a portion of bonus compensation on successful execution.<sup>d</sup> There is no doubt that the use of diversity scorecards and strategy maps is important, but they often fall short of describing why diversity targets (or metrics for that matter) are critical and how meeting them would generate financial value for businesses. Therefore, inconsistencies between what D&I practitioners believe is valuable, what they actually measure, and

what businesses tend to value have prompted much concern over "the ROI of D&I."

Intuitively, D&I practitioners believe that the creation of a balanced and representative workforce that mirrors the marketplace; a fair, respectful, and inclusive culture that seeks full employee contribution; a representative and balanced leadership team that mirrors the company's workforce; and parity in pay and promotions can positively impact business performance.<sup>e</sup> Yet they often lack hard evidence (e.g., a calculated ROI) when business leaders question the value of diversity and inclusion. Many consulting firms and D&I practitioners have taken a stab at finding the relationship between D&I and financial performance over the past several years. At best, these efforts have only found a correlational rather than a causal relationship. Perhaps this can be explained by the use of insufficiently rigorous research methodologies, which fail to evaluate the linkages all the way up to firm-level outcomes and tease out how other strategies—both human capital (e.g., human resource) and non-human capital—influence business performance.

Many have sought to establish a performance relationship between diversity and business by first examining existing D&I strategies, and then attempting to find links to business value. While this method may seem prudent, the most frequently mentioned conclusion—"D&I has led to significant year-over-year revenue growth"—ignores the fact that marketing professionals, technology professionals, and human resource professionals are also claiming the same general relationship.

(continued on page 20)

<sup>a</sup> See Stephanie Creary, *Leadership, Governance, and Accountability: A Pathway to a Diverse and Inclusive Organization*, The Conference Board, Research Report 1429, 2008, p. 21.

<sup>b</sup> Robert S. Kaplan and David P. Norton, *The Balanced Scorecard: Measures that Drive Performance* (Boston: Harvard Business Review, 1992).

<sup>c</sup> Ibid.

<sup>d</sup> Creary, *Leadership, Governance, and Accountability*, p. 17.

<sup>e</sup> Creary, *Leadership, Governance, and Accountability*, p. 14.

(continued from page 19)

In contrast, more quantitatively rigorous “top-down” and “bottom-up” methods start with key financial and organizational performance measures and then look for human capital strategies that drive the desired outcomes. Research from The Conference Board identifies these methods as “evidence-based human resources” (EBHR), which rests on two key characteristics—a focus on business strategy and standards of evidence (i.e., determining the presence and strength of a causal relationship).<sup>f</sup> This approach is already used by firms such as Hewlett-Packard and Capital One. Since 2004, HP has been using top-down, evidence-based practices to measure behavior and performance of its customer support operation teams and how these are aligned with the company’s ability to build and maintain a “

customer-centric culture.”<sup>g</sup> Capital One has had a solid history of using bottom-up analytics to demonstrate the strategic value of human resource practices to firm-level outcomes. Their workforce analytics team has been able to successfully demonstrate the impacts of the company’s executive coaching program and has established links between bank teller attrition, customer satisfaction, and revenues per account at retail branches.<sup>h</sup>

While it is true that EBHR has traditionally investigated evidence-based practices within the HR function, it does offer a promising model for D&I practitioners who seek to develop similar quantitatively-rigorous studies that extend beyond an often oversimplified “ROI of D&I” approach.

<sup>f</sup> John Gibbons and Christopher Woock, *Evidence-Based Human Resources: A Primer and Summary of Current Literature*, The Conference Board, Electronic Report 15, 2007.

<sup>g</sup> Christopher Woock and John Gibbons, *Evidence-Based Human Resources in Action: Case Studies*, The Conference Board, Research Report 1427, 2008, pp. 6–8.

<sup>h</sup> Woock and Gibbons, *Evidence-Based Human Resources in Action: Case Studies*, pp. 9–11.

Regardless of the metrics selected, it is critical that they are aligned with the measures of business success used by the organization. Without that alignment, without being relevant to the business, diversity and inclusion metrics are just a bunch of numbers. Even though the rigor needed for compiling data using metrics is an activity some D&I executives do not connect to, they must become comfortable with the process. They must be able to determine and communicate how such classic metrics as hiring, turnover, retention, representation, promotions, and supplier diversity affect business operations. Moreover, the definition of success should be less about benchmarking and more about continuous improvements that lead to outcomes that affect the bottom and top lines.

How can D&I professionals connect the dots and link traditional metrics to business outcomes? The following examples offer some initial avenues.

**Talent management and talent development** While bringing talent onboard is part of the job description, a D&I executive will not be successful unless he/she manages and nurtures the talent properly. When adding headcount in key areas of growth, diversity is integrated with business strategy. Developing talent internally means not having to hire outside and that creates value.

**Contribute to multicultural market share** It delivers new business, new markets, and connects to profits and growth.

**Supplier diversity** In many organizations, this is aligned with corporate social responsibility objectives. Many C-suite executives are still unaware of the bottom-line benefits of a diverse supply chain and how a strong program that helps develop diverse suppliers can deliver real cost savings. In the United States, the unfolding government stimulus plans at various federal, state, and local levels may introduce significant cost-saving opportunities for an organization that has a strong supplier diversity initiative.

**Cultural competency** This is a must-have for D&I executives that can be leveraged across the organization to train senior business leaders in the skills required to do business anywhere across the globe. It can also be leveraged to help executives in the development of cross-cultural and virtual teams. D&I executives need to develop leaders who are learning about other people and other cultures, not just about themselves and their own culture.

## From the Blogosphere: Tough Questions about the Real World

Diversity and inclusion professionals attending the joint meeting were given the opportunity to use a blog to raise and respond to issues affecting the future of the profession and to pose questions about the challenges and direction facing the profession. Here is a sampling of the issues raised.

**The Issue: Has there really been progress?** “While 82 percent of those present lead diversity and inclusion strategy, more than half of those present have five or fewer years of experience in diversity and inclusion....What does this mean in terms of the sustainability of the field...for knowledge transfer? Or, are we just asking and answering the same questions today that we were asking and answering 15 years ago? Have we really made any progress?”

*Response* “The questions asked 15 years ago were compliance driven and focused on short-term results. Today, I believe that we are asking questions more strategically with long-term results in mind. Our progress over the last 15 years has been around our ability to more effectively position D&I as a strategic business imperative, but we still struggle to show what “good” really looks like.”

*Response* “We have an opportunity to learn from the United States. And we also have a responsibility as D&I practitioners to learn from the mistakes and places where D&I is ‘stuck’ in the United States, so that we realize that an entry point for this work outside of the United States does not have to be from compliance or legislation. New generations, cultures, [and] business practices around the world could lead us to some other creative breakthrough entry and impact points for this work if we can learn to challenge our own assumptions and ideas about what we call ‘the work.’”

**The Issue: Virtual teams** “How can you [affect] the culture of virtual employees? If the majority of the team is virtual, how can this be embraced, what strategies can be incorporated to make this virtual culture more inclusive? Furthermore any suggestions/ideas on how to first establish a baseline [or] what are the baseline metrics to do this?”

*Response* “A way to establish a baseline could be an employee opinion survey (EOS) that includes particular questions regarding D&I. Once you have the results, you could even do focus groups (even virtually) to understand issues further.”

**The Issue: When corporate and national cultures collide** “If majority group men (with respect to race, skin color, sexual orientation, age, and ability) in each country outside the HQ country wanted to avoid D&I work, would asserting that what is being proposed is HQ-country-location-centric and demonstrates [a] lack of understanding of local culture, would this be an effective strategy for avoiding this conversation? Perhaps what we are experiencing when we try to address D&I globally needs to at least accept that this might be a possibility worthy of further investigation.”

*Response* “How can we break this down? Are we asking them ‘Why’ enough? What’s needed is to engage earlier in the process with real examples and dialogue.”

**The Issue: Defining diversity** “It’s true that people aren’t all in the same place, and it can be confusing sometimes to hear contrasting philosophies about D&I approach. For instance, one company says, difference makes the difference and another one says diversity is more about similarities than differences. One company says outcomes matter; another says outcomes are not important, only impact. Most companies still agree that you must have metrics to measure progress and metrics often are physically defining.(i.e., skin color, gender, sexual orientation), but one company proposes having only one category—“human”—and measuring if they feel valued, included, and empowered to make a difference. Is that assuming that biases against physical characteristics don’t exist? I’m not discounting the idea, just trying to figure out how/if that would really work.”

## About This Report

This report is based on presentations and discussion from two unique forums presented by The Conference Board. In May 2009, The Conference Board hosted a three-day joint meeting of members of its Diversity and Inclusion Councils from around the globe. The meeting featured more than 60 members representing the best and brightest in the diversity and inclusion (D&I) field at many of the world's largest and most innovative companies from the Americas, Europe, and Asia. Immediately following that meeting, The Conference Board held its annual Diversity and Inclusion Conference, where 211 participants focused on current trends and challenges in the field and the struggle multinational companies face when embedding D&I programs in multiple cultures around the world.

The joint council meeting, which was held under Chatham House rules—participants may use the information received; participants may not reveal the identity or the affiliation of the speaker(s); and participants may not reveal the identity or affiliation of any other participant—is the main source of material for this report. The D&I conference supplied supplemental information, which, unlike the council material, is credited to specific sources. The views and opinions expressed in this report are those of the council members and conference presenters and participants.

### About the Authors

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Membership in one of our Councils affords entrée into a select and trusted community of 2,500 executives from a broad array of industries, functions, and regions—executives who know the value of this rich source of insights and new approaches.

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For 80 years, The Conference Board has organized small, intimate, cross-industry networking peer groups that bring together executives in a specific function to share information and best practices. These highly interactive members-only networks facilitate ongoing interaction, communication and benchmarking among leaders from the world's top companies. Each group is a unique member-driven forum enhanced by the vast resources of The Conference Board, including our research, economics, conferences, working groups, Web casts, and special events. Periodic face-to-face meetings help to foster the strong personal relationships that make council participation such a powerful ongoing resource for today's busy executives who need a source of immediate trusted feedback. Councils in the Diversity and Inclusion space include: Asia-Pacific Diversity, Work-Life Strategy Council, Council Alumni Program, Council of Diversity Executives, Council on Work Force Diversity, Diversity & Inclusion Council, Diversity & Inclusion Strategy Council, Diversity Business Council, European Council for Diversity in Business, Supplier Diversity Leadership Council I & II

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