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A Holistic DEI Approach on People, Process, and Technology

Best Practice Guide

Diversity, Equity, and Inclusion (DEI) are vital in building and maintaining a successful organization. Many organizations have tried to show commitment in promoting DEI in the workplace through hiring diverse talent, building Diversity strategies and appointing DEI executives. However, many of the efforts also still fail to deliver.

The truth is, making a *real* change with DEI efforts will require more than just commitment. It needs a profound approach that involves the whole organization's engine: people, process, and technology.

This guidebook discusses why DEI efforts often fail and how organizations can align people, processes, and technology to make meaningful and sustainable change. It provides useful insights and practical tips for leaders, HR, and people managers who are on the mission to build more inclusive organizations.

Defining Diversity, Equity, and Inclusion (DEI)

Before we jump in, let's understand exactly what Diversity, Equity, and Inclusion mean:

Diversity

The **characteristics of people** that make them unique. DEI initiatives seek to create workplaces that reflect the diversity of the population they serve.

Equity

Equity is about being **fair and just**. The difference between Equity and Equality is that equality focuses on giving everyone the same resources or opportunities, and Equity focuses on giving everyone the resources and opportunities they need to reach the same outcome. Imagine two people picking apples from a tree planted on a hill. If you give both people the same height ladder, the one standing uphill will be able to reach the apples, but the one standing downhill won't. This is equality: both people received the same ladder. Equity gives the person standing downhill a taller ladder, allowing both people the resources and opportunities they need to reach the apples.

Inclusion

Creating a workplace where people feel integrated and heard in all organizational policies and practices. Having Inclusion is what makes people feel like they work in an organization **that cares about, listens to, and considers all people**. This is the end goal of DEI work, and it is the hardest part to achieve and sustain.

Note that from the definitions above, it is possible to have a diverse workforce where people do not feel heard and appreciated. So, Diversity is only the start. Let's take a look at why many DEI efforts often fail in organizations.

Why DEI efforts often fail

Police brutality incidents against Black community have ignited an already passionate social justice movement across the United States and the world, and with it has come a **new vigor** for businesses and workplace researchers to meaningfully embrace diverse workforces and cultures. While organizations have been focused on Diversity, Equity, and Inclusion (DEI) efforts for decades, research shows that most **DEI efforts fail** to make sustained organizational impact and change. But why?

The reality is that organizations are filled with people, and all people have unconscious **biases**. We tend to naturally gravitate to those we have more in common with (affinity bias), seek information that confirms what we already believe (confirmation bias), and fall prey to several other biases each day. At organizational scale, human biases create vicious cycles of systematic inequity.

Consider this: you would likely describe yourself or the managers in your organization as good leaders. They work hard, genuinely care about their people, and help others grow. However, bias **subconsciously slips into our daily decisions**, and all of us, including good managers—those who have a good judge of character—run the risk of selecting and providing more development opportunities to those that we can "see ourselves in" or "fit into our culture".

This bias in selection and development compounds: stunted Diversity from day one leads to even fewer diverse individuals gaining the experience required to make them "ready now" for a promotion. This funneling effect makes it impossible for organizations to make real progress with their DEI initiatives.

This begs the question: as we embark in earnest to build cultures that create equitable opportunity for all people without regard to race, gender, religion, nationality, disability, sexuality, age, and class, what can we do to make real change?

Success requires a holistic approach that includes people, processes, and technology. To make DEI efforts work, you need to know how you can leverage your people, create standard processes, and leverage HR technology throughout your employee lifecycle to promote Diversity, Equity, and Inclusion.
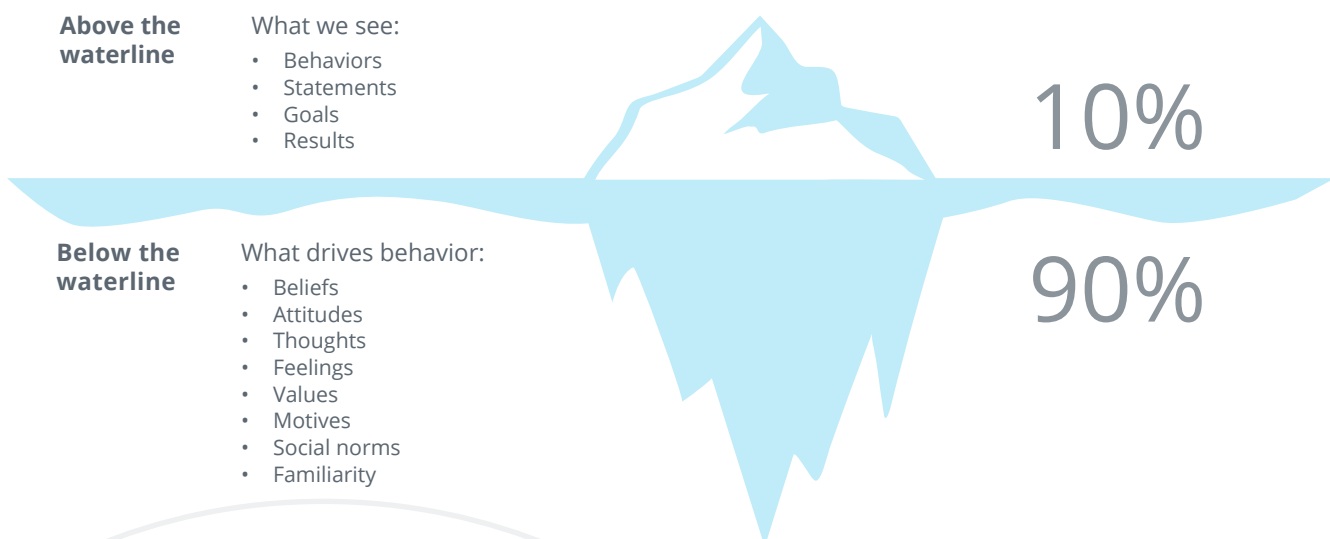
First, let's consider the most important lever for driving a successful DEI program in organizations: people.

1. People

DEI does not just involve sourcing, hiring, and promoting a workforce that represents the population it serves. It also means building awareness for your entire workforce about the underlying and often subconscious beliefs, attitudes, and feelings that drive behavior.

Many use the Iceberg Model to discuss this challenge. In this model, you can see that only 10% of the iceberg sits over the water, and this represents what we can see: what people say and do, results, etc. But the other 90% of the iceberg sits under the water, representing internal and often subconscious factors that drive human behavior.

Above the waterline

What we see:
- Behaviors
- Statements
- Goals
- Results

10%

Below the waterline

What drives behavior:
- Beliefs
- Attitudes
- Thoughts
- Feelings
- Values
- Motives
- Social norms
- Familiarity

90%

Organizations often try to make change amongst their people using Diversity training. However, this training is often wrapped up in annual mandatory training or focused on handling grievances after they are raised. This type of training reactively addresses issues rather than proactively tackle the vicious cycle of systematic bias described above.

Real change requires a deeper, cultural shift. Successful Diversity programming must be approached strategically, but then must be rolled out in a voluntary way by asking teams to opt-in. As professors, Frank Dobbin and Alexandra Kalev put it in their HBR article *Why Diversity Programs Fail*, for DEI efforts to succeed, they must "engage managers in solving the problem, expose them to people from different groups, and encourage social accountability for change."

This method increases ownership for those participating (they chose to participate, so they feel responsible), which ultimately increases the likelihood that participants will engage in critical thinking about their underlying beliefs and behaviors that may be inconsistent with what they believe to be true about themselves. These voluntary participants then become Diversity champions for the organization and can be leveraged alongside leadership and HR as business partners to help make messages and strategies sink in and stick.

## To change the culture, you have to change the conversation.

DEI strategies cannot just tell people what to do differently, they must focus on the under-the-water cultural drivers of behavior. This means training should focus on:

- Raising awareness and building knowledge about bias

- Creating a desire for people to opt into change through storytelling and casting a vision of the benefits of a more inclusive workforce

- Training people to recognize their biases and providing them with tactics to change their behavior. Learn more how to overcome biases here.

- Setting clear expectations about what is and is not tolerated

- Repeating the same messages and expectations by weaving them into the fabric of the organization (HR processes, strategic goals, metrics, competencies, cultural beliefs, corporate values, mission statements, etc.)

- Reinforcement through creating a safe space to hold people accountable, creating a psychologically safe environment to have challenging conversations, and calling others out when they do not deliver

The above is true especially if you work for a large, complex, matrixed or geographically diverse organization. Only when you feel you have exhausted the point is the message just sinking in throughout the organization—keep chugging forward.

It must also be emphasized that the key to the success of every DEI strategy is *leadership involvement*. C-suite leaders must walk the walk by holding themselves and others accountable to objectives, weave DEI into organizational level business goals, and lean into Diversity as a strategy when times get tough, rather than back away until they have the time and space for this work (hint: that time will never come).

With this groundwork laid about how organizations can engage their workforce to champion DEI efforts, let's further our focus on the lever: the processes required to sustain organizational change.
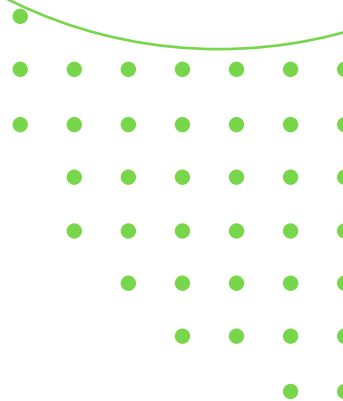
2. Process

In this part, we will discuss how standard processes throughout the employee lifecycle create the infrastructure to stand up and sustain efforts to create a diverse and inclusive work environment.

The lack of standardized or consistently reinforced talent lifecycle processes is a huge barrier to the success of DEI efforts. Lack of mutual understanding between recruiters and hiring managers means qualified candidates are screened inconsistently and inaccurately. The lack of standard interviews allows bias to creep into selection decisions. Inconsistent onboarding creates variable engagement and increased turnover. Lack of objective data in the succession planning process creates vicious cycles of systematic inequality in promotions... and the list goes on.

The following parts provide you with a checklist, steps to take, and a troubleshooting guide that you can use when standardizing your HR processes to maximize DEI.

A checklist for creating an inclusive talent strategy

Standard DEI initiatives must be woven into each stage of the employee lifecycle to take root. To help provide a frame for how DEI fits into this broader cycle, see the list of employee lifecycle stages and their definitions as they relate to DEI below:

1 **Recruitment:** Sourcing candidates from diverse talent pools and attracting them to apply.

2 **Employee Selection:** Creating an engaging candidate experience that helps diverse candidates see themselves in the role for which they are applying and objectively identifies those most likely to perform successfully in the role.

3 **Onboarding:** Providing new employees with the tools, resources, training, time, and opportunities they need to become productive, and providing managers guidance about how to personalize the onboarding experience for each employee (remember the difference between Equality and Equity).

4 **Engagement and Retention:** Providing clarity and resources for success, fostering an inclusive and supportive culture, growing strong leadership skills, offering opportunities for career growth.

5 **Development:** Providing all employees with equal opportunities and means to build skill and ability through on-the-job experience, learning from others, and training.

6 **Performance Management:** Ensuring all employees continuously understand their current level of performance, their current goals, and providing regular feedback.

7 **Talent Review and Succession Planning:** Objectively assessing the current state of talent across the organization and identifying strong performers with the potential and desire to take on a higher-level role.

To get a gauge on how deeply woven your DEI strategy is into your talent lifecycle strategy, use the worksheet in Appendix A.

As you read through the worksheet, ask yourself the following questions:

- Can I articulate my organizational strategy in this area?

- In what ways does this **strategy promote a diverse and inclusive culture?**

- Is this strategy executed consistently across the organization?

- And most importantly, can my front-line leaders articulate this strategy?

10 steps for building an inclusive process across the employee lifecycle

Taking into consideration the list of processes above, if your organization does not already have standard processes in place today, start with some of these basic steps:

- Create accurate job descriptions that lay out the responsibilities and competencies required for success in each job or job family.

- Post all of your job openings internally and externally to provide opportunities to grow talent and to continuously source diverse talent.

- Take the necessary time and effort to ensure a **diverse candidate pool** through intentional sourcing.

- Use standardized structured interview guides consistently across the organization.

- Provide interview and hiring training to ensure objectivity and teach hiring managers how to avoid biases in the hiring process.

- Utilize an organization-wide competency model to align business and people strategy and give you a consistent language to discuss talent.

- Leverage the combined expertise of your DEI and learning and development teams to create an infrastructure to educate and reinforce DEI initiatives.

- Tie individual financial incentives to inclusive workplace metrics.

- Include items related to creating an inclusive workplace in engagement or other organizational surveys.

- If you have a board of directors, ensure the makeup of the board reflects the **Diversity** of the organization and populations you serve.

Troubleshooting an unsuccessful execution of your DEI strategy

If you already have standard processes in place, but those processes are not making an impact, ask yourself:

• Are our practices being implemented consistently across the organization? If not, why?

• Do all our HR practices incorporate DEI efforts?

• What objective data (e.g. assessments) do we incorporate into our people decisions and development efforts today?

• What stated goals and expectations do we have around DEI? How are our leaders held accountable?

Focusing on Inclusion

To this point we have focused on using standard HR processes to improve objectivity and fairness to drive increased Diversity. Diversity is the first step, but these initiatives will fail if there is not a culture of Inclusion. In other words, people must feel welcomed, heard, and represented for the Diversity within the organization to succeed.

Some initial steps to increase Inclusion may be the creation of Employee Resource and Affinity Groups, company cultural celebrations (e.g. Black History Month or Pride Month), internal dialogues, and company statements about commitment to Diversity, Equity, and Inclusion.

But the real measure of success comes in the culture and environment created within the organization. Is there an atmosphere where diverse opinions, perspectives and ideas belong and are valued? Some questions to consider as you go down the path of creating processes to foster Inclusion:

• Do our leaders believe there is a strategic benefit for growing a diverse and inclusive workforce?

• Does the way we incentivize our people today strengthen or take away from our efforts to build a diverse and inclusive workforce?

• How do we measure our progress and obtain our diverse employees' opinions? (e.g. engagement surveys).

• What does our leadership look like? Do all employees see themselves represented in leadership to inspire a career path for themselves?

• What is our messaging around DEI? What do we say externally and internally? Do we follow through on our statements and commitments?

Creating a culture where all facets of Diversity are valued, respected, and utilized is critical to retaining diverse talent. As discussed in the People section, the first step in implementing DEI strategies that lead to meaningful and sustainable culture change is engaging leaders and energizing a network of champions throughout the organization. This excitement and commitment must then be supported through standard and consistently applied organizational processes to build momentum and make it easy for employees to sustain their efforts.

Next, in the final section, we will explore how you can use technology to scale and measure your DEI efforts.
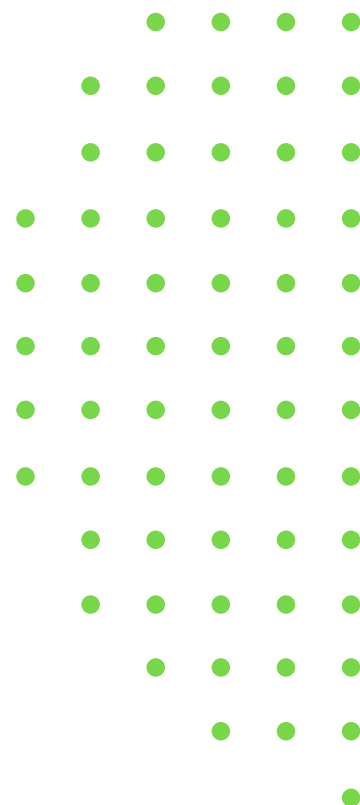
3. Technology

Technology plays an important role in DEI efforts throughout the employee lifecycle. It can help increase objectivity and **boost** your talent assessment process. Two key benefits of implementing technology for DEI initiatives include:

1. Reducing recruiting bias and nurturing a diverse candidate pool

2. Increasing accuracy, objectivity, and visibility in talent management

Let's explore these in more detail.

Reducing recruiting bias and nurturing a diverse candidate pool

When it comes to talent acquisition, recruiters are being **stretched to the point of burnout** and then take the heat when managers struggle to find the right people to fill their roles. They often have just an application and a resume to leverage to make the first screening decision about who moves on and who does not, even though it is now widely accepted that resumes are among the **least predictive sources** of information we have about candidates—talk about starting off on the wrong foot when it comes to selecting the best and most diverse talent on the market!

From the candidate perspective, the job landscape has changed substantially since the onset of COVID-19 and today more people are **seeking permanent remote work** opportunities and more companies are offering **flexible working arrangements**. While this can create technological and logistical challenges for organizations, removing **location bias** also provides the opportunity for employers to maximize their ability to recruit diverse talent by reaching into different and more diverse talent pools.

Implementing the right HR technology into the talent acquisition process can address both recruiter strain and candidate experience.

1. First, ***using a platform that incorporates job-related measures*** like **psychometric assessments**, realistic job previews, and **video interviewing** allows recruiters to gather job-related and predictive information about candidates far beyond a resume and application, and allows recruiters to compare candidates apples to apples by collecting parallel data. Standardized reporting and candidate dashboarding allow recruiters to scale and make faster recommendations and reduce stress by increasing confidence that they are making more accurate and fair decisions. Importantly, implementing processes like these helps organizations eliminate issues like variability in resume quality and **resume bias**, a prominent phenomenon in which those making hiring decisions subconsciously screen out candidates when they don't naturally associate with a particular line of work.

2. Second, as organizations recruit from wider and more diverse candidate pools, ***technology can educate and engage candidates***,

which helps solicit additional job-related information and minimize dropout. We usually think of the candidate experience as a chronological one in which candidates research organizations and open jobs before they apply. In reality, most candidates apply for many jobs and then learn about the organization and role as they go through the selection process. Using an interactive candidate platform allows organizations to educate candidates at scale by providing short bursts of information about the organization, the role, and a realistic preview of the work. The interactive component also increases engagement by encouraging candidates to share more information about themselves in a structured and standardized way (e.g. through short assessments, realistic job previews, video interviews, etc.). This process is engaging for candidates because it allows them to put their best foot forward and to learn more about the role on their own time, while at the same time giving recruiters job-relevant information.

Increasing accuracy, objectivity, and visibility in talent management

Once employees are integrated into the organization, many HR teams still rely on spreadsheets and slide decks to run workforce review, succession, and development planning. This means manual creation of talent dashboards and merging multiple data sets together to ultimately provide little ability to answer talent questions in real time, a lack of visibility into talent across the organization, and perpetually outdated information. Lack of the right tools leaves skilled HR business partners stuck in data collection and project management rather than using data to create insights and actionable strategies with business leaders.

Understanding our current workforce is of critical importance for organizations and often extremely challenging. Through platforms that enable the collection of relevant psychometric data on employees and the functionality to analyze the data from an individual and aggregate view, we can achieve a much deeper understanding of current workforce. Understanding strengths and weaknesses from an organizational, functional and/or regional perspective allows us to make informed strategic decisions around training and development investment at a broad scale. Team and individual data enable more informed decisions on smaller developmental programs and an understanding of development needs from an individual perspective to provide relevant opportunities based on each of our unique needs.

Leveraging the right HR technology can unlock real time insights using objective data to drive development and key talent management decisions. Dashboards that combine psychometric data and the specific contextual requirements of critical leadership roles unlock a deeper understanding of the potential match of leaders to these positions that are essential for organizational success. From there, development plans and necessary leadership experiences can be defined for high potential leaders to create more refined succession plans.

Finally, the right technology increases the Inclusion of diverse leaders from across the company, allowing you to uncover hidden gems who may not have been considered for specific roles or opportunities, but have the abilities, potential, and necessary experiences to thrive in a critical role.

Closing

Diversity, Equity, and Inclusion (DEI) together are critical for a better workplace and continuous success. An inclusive workplace is the culmination of DEI work, and it is the hardest one to achieve and sustain. Despite that, many organizations still fail to deliver a real change with their DEI initiatives due to unconscious biases.

To make DEI efforts succeed, a holistic approach in the triangle of people, process, and technology is compulsory. This includes knowing how you can leverage your people, creating standard processes, and leveraging HR technology throughout the employee lifecycle to promote Diversity, Equity, and Inclusion.

In regard to people, just telling people what to do differently will not work. Leaders must understand what drives behavior and change the conversation through culture change and local champions. Moreover, leadership involvement is also as important, especially in difficult times. Leaders must be held accountable to objectives and are responsible to weave DEI into organizational level business goals.

The next step is to standardize the process. This is to ensure that your DEI strategy is consistent throughout the whole organizational processes, starting from recruitment to talent review and succession planning. Prepare a checklist and a troubleshooting guide in your back pocket in case things do not go as planned. Check out Appendix A for the ready-to-use checklist.

Finally, the right technology has the potential to help organizations maximize the Diversity in their candidate and leadership pipelines, ultimately allowing them to make a real change with their DEI efforts. And by integrating this with people strategy and process standardization, you can have confidence that you are doing the meaningful and difficult work of making real change.

Appendix A: Checklist

Use this list to evaluate how deeply woven your DEI strategy is into your HR processes today.

Questions	Answer Circle One
Can I articulate my organizational strategy in DEI area?	Yes / No
Can I articulate my organizational strategy in DEI area in the following processes in the employee lifecycle?	Yes / No
Recruitment: sourcing candidates from diverse talent pools and attracting them to apply	Yes / No
Employee selection	Yes / No
Onboarding	Yes / No
Engagement and retention	Yes / No
Development	Yes / No
Performance management	Yes / No
Talent review and succession planning	Yes / No
In what ways does this strategy promote a diverse and inclusive culture?	Yes / No
Is that strategy executed consistently across the organization?	Yes / No
Can my front-line leaders articulate this strategy?	Yes / No

If you answer "No" to any of these questions, see the "10 Steps for building an inclusive process across the employee lifecycle" and "Troubleshooting an unsuccessful execution of your DEI strategy" sections of this guidebook to get started or learn more.