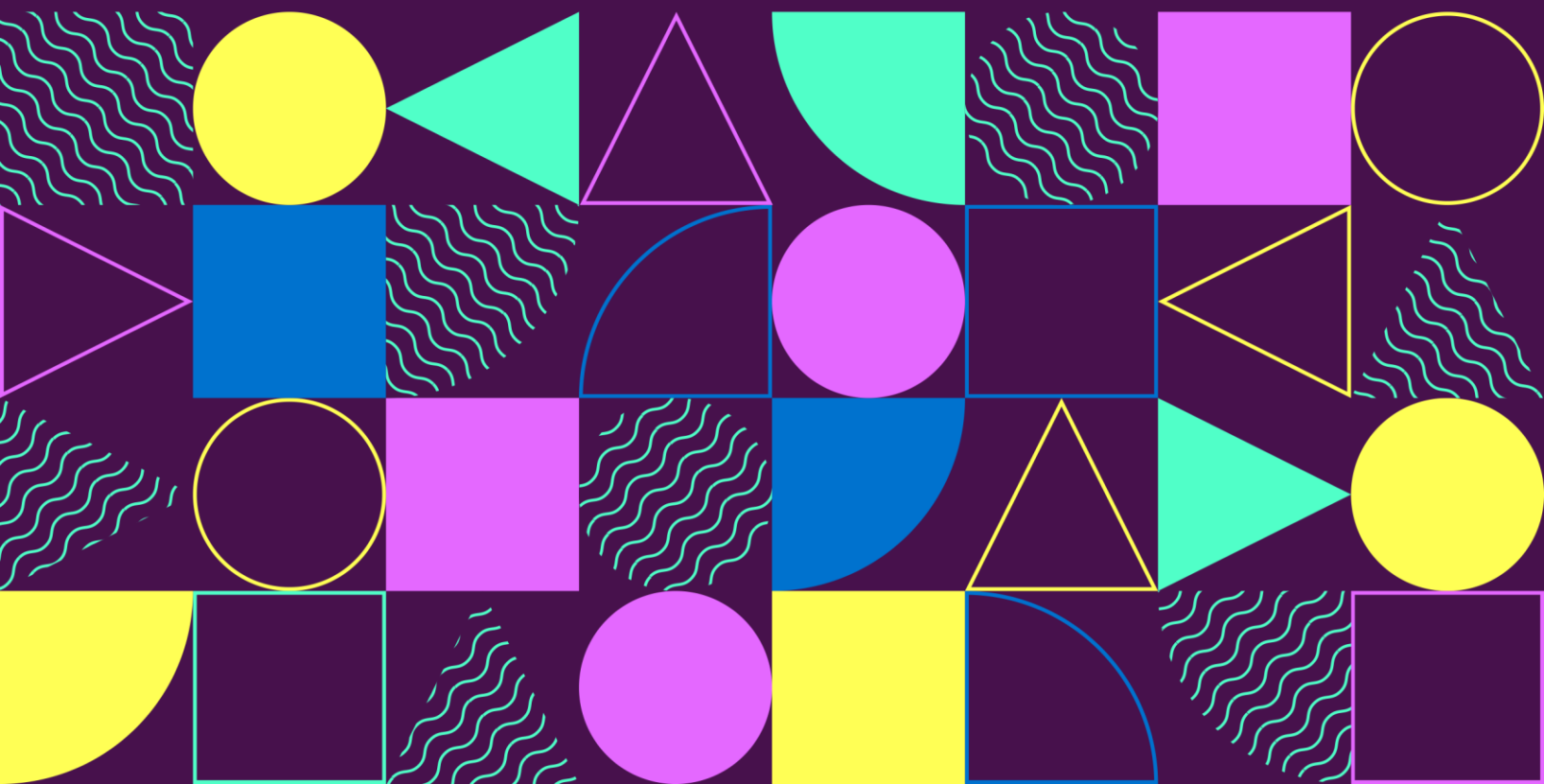


Guide

Resilience Roadmap: Navigating DEI Strategy Implementation



Critical Steps for DEI Strategy Thought Leadership

In *Leading Change*, John P. Kotter contends that successful firms in a fully globalized and ever-evolving economic environment are those capable of implementing long-term change. This capacity allows them to remain competitive in a rapidly shifting market, respond effectively to new threats, and seize new opportunities. To achieve this, **there are four critical steps for implementing a thorough DEI strategy:**

1

Create Urgency

Communicate the need for change and the consequences of maintaining the status quo

2

Form a Powerful Coalition

Establish a guiding coalition of influential leaders and stakeholders who can champion the change

3

Create a Vision for Change

Convey a clear and compelling vision that articulates the desired future state

4

Communicate the Vision

Effectively communicate the vision for change to all stakeholders

Each of these steps uses storytelling enhanced by data. Effective change management storytelling involves implementing organizational changes that are well received and lead to the desired outcomes. **Key success factors in change management include:**

- **Change Management Methodology**
- **Clear Communication**
- **Employee Involvement**
- **Flexibility and Adaptability**
- **Risk Management**
- **Celebrating Successes and Learning from Failures**

Change Management Methodology

Change management methodology is a structured approach used by organizations to ensure that changes are smoothly and successfully implemented and that they achieve lasting benefits. It involves preparing, supporting, and helping individuals, teams, and organizations in making organizational change. The methodology component guides how leaders prepare for change, manage the change process, and reinforce the change to ensure it sticks and achieves its intended outcomes.

Three approaches to leading change:

Inspiration & Awareness



"How do I win the hearts and minds of leaders and staff, so they understand and prioritize DEI?"

Metrics, Policies & Accountability



"What are the right incentives, policies, and metrics to hold leaders and staff accountable?"

Volume of Activity



"Are we implementing all the proven programs, initiatives, and practices from the field?"

Three pitfalls to avoid:

Lack of Focus and Prioritization

Quick to Assume What's Preventing Change

Relying on Solutions that Rarely Change Behavior



"Organizational change initiatives get stuck because the strategies are usually formed on [wrong] assumptions about people."

Dr. Paul Gibson
Author of The Science of Organizational Change

Sources: Kohn, Alfie. Punished By Rewards: The Trouble with Gold Stars, Incentive Plans, A's, Praise, and Other Bribes. Boston: Houghton Mifflin Co, 1993; McKinsey, L., and J. Wehner. "Context Matters: Moving Beyond 'Best Practices' to Creating Sustainable Change." 2020; Gibbons, Paul. The Science of Organizational Change: How Leaders Set Strategy, Change Behavior, and Create an Agile Culture. 2019; Seramount interviews and analysis.

Clear Communication

One of the most significant obstacles we face as we develop a strategy and communicate its importance is determining how to convey the DEI story in a way that is informative, easy to understand, and executable across functions. Using DEI data to communicate the most critical reflections and goals is vital, but it is equally important to share this DEI data in the right place, with the right people, and at the right time.

Three common ways organizations share and communicate their DEI strategies:



DEI Reports

DEI Reports provide incredibly detailed insight into each focus area. Reports highlight wins, new directions, challenges, and future plans based on the DEI strategy. Reports can be released internally or externally and usually include insights from the organization's leaders.



DEI Dashboard

DEI Dashboards are the one-stop shop for real-time insights on what is happening along the critical DEI focus areas. Dashboards are comprehensive and do not tell a story when standing alone.



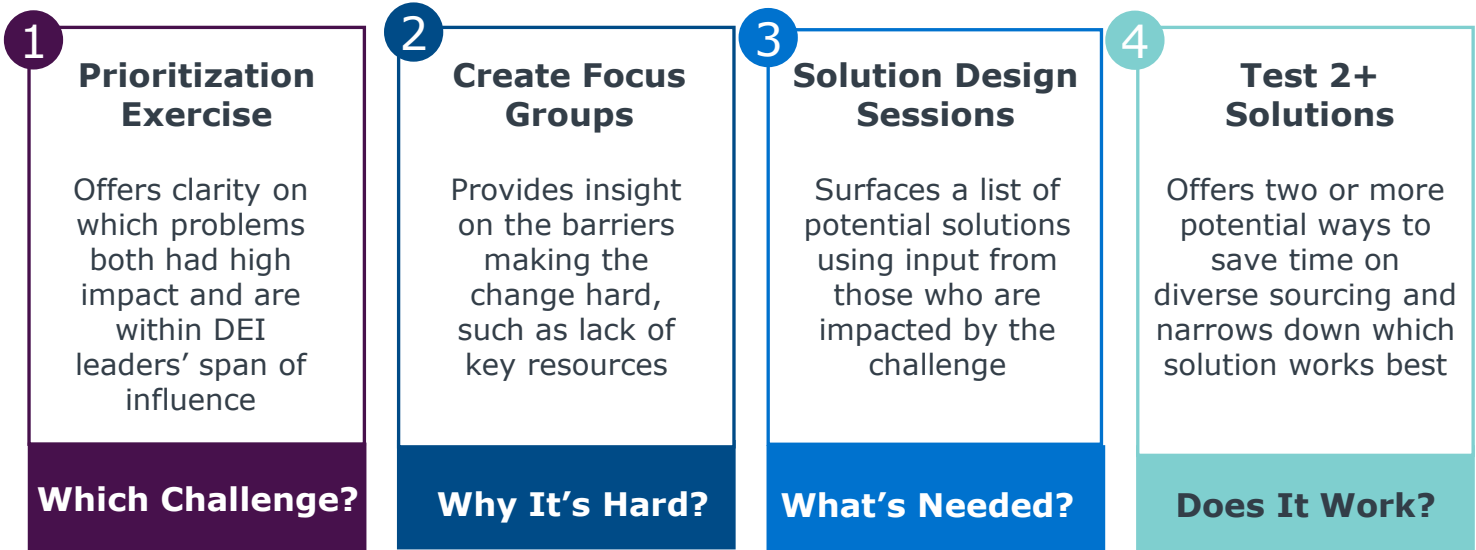
DEI Scorecards

DEI Scorecards amplify and add context to the data captured in the DEI dashboard. Scorecards tell how well an organization is progressing and whether DEI targets have been met.

Employee Involvement

After picking a challenge that needs attention, the next steps are to uncover all the details behind why that problem exists and what needs to change. Inviting employees to participate in focus groups is just one way to increase employee involvement. **The more you listen, the more you find.**




Methods for gathering and testing input from key staff:



Results: NPR's Gains from Applying the Prioritization Process

The NPR team tested two approaches to determine the most effective solution for managing a high volume of emails. After several months, newscasters concluded that a centralized spreadsheet and folder system was the most efficient method.

This small victory not only solved the immediate problem but also generated significant momentum for broader change initiatives. Importantly, studies show that initiatives are 30 percent more likely to succeed when end users are involved in the design process. This exemplifies a behavioral science principle that suggests people are more committed to a solution and more likely to follow through when they have a hand in creating it.

 Increased number of journalists using diverse sourcing	 Created small wins momentum for future DEI change	 Initiatives are 30% more likely to stick when end users help design the change
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Sources: Ewenstein, Boris, et al. "Changing Change Management." 2015; Bopaiah, Minal. Equity: How to Design Organizations Where Everyone Thrives. 2021; Seramount interviews and analysis.

Flexibility and Adaptability

Flexibility and adaptability are related but distinct concepts. Adaptability refers to the ability to adjust to new environments and situations, whereas flexibility is about one's willingness to make these adjustments. The more open you are to change and compromise, the more flexible you become. [The Center for Management and Organization Effectiveness](#) gives **four reasons why good leaders should possess flexibility and adaptability in the workplace:**

1

To Learn from Challenges

- Leaders who embody flexibility and adaptability view challenges as opportunities for growth, tackling them head-on to learn from mistakes and roadblocks.
- Studies indicate that leaders lacking adaptability are often perceived as risk-averse, defensive, closed to new ideas, and resistant to feedback.
- Possessing flexibility and adaptability equips leaders with the emotional intelligence to learn from errors, respond effectively to feedback, and maintain composure under pressure.

2

To Create and Adjust Plans

- Effective leadership involves not just setting strategic plans, but also creating agile approaches that adapt swiftly to unforeseen challenges, enhancing both personal and team value.
- Leaders who embrace diverse thinking and step outside their comfort zones can adjust quickly to changes, demonstrating the power of adaptability.
- Leaders proficient in rapid response are twice as likely to successfully implement change compared to those who lack flexibility and adaptability.

3

To Be Better Equipped with Diverse Leadership Styles

- Daniel Goleman asserts that effective leadership depends on adapting styles to fit specific situations and people, rather than sticking to a single style.
- Goleman outlines six leadership styles: coercive for quick decisions in crises; authoritative for goal-oriented autonomy; affiliative for fostering team harmony; democratic for encouraging collaboration; pacesetter for high achievers; and coaching for personal development.
- Leaders must skillfully choose and adjust these styles based on the unique demands of each situation and the needs of their team members.

4

To Create Successful Teams

- Leaders who learn from mistakes, adapt plans strategically, and utilize diverse leadership styles not only enhance their own effectiveness but also strengthen their teams.
- By demonstrating flexibility and adaptability, leaders naturally instill these qualities in their team members, fostering a culture of resilience.
- Successfully handling crises and meeting deadlines hinges on the team's openness to change, which in turn fortifies their overall strength and adaptability.

Risk Management

Identifying potential risks and developing strategies to mitigate them is crucial in minimizing disruptions and ensuring the smooth implementation of change initiatives. Proactively recognizing these risks allows organizations to prepare contingency plans, allocate resources effectively, and adjust timelines as necessary. By doing so, they not only enhance the resilience of their change processes but also maintain momentum and support from stakeholders.

Key elements of risk management:

- Full view of organization’s risk exposure
- Clear, predetermined criteria for assessing risks
- Risk treatments designed by area experts
- Continual monitoring, assessment built into process
- Ongoing communication with stakeholders

Comprehensive risk management process:



Celebrating Successes and Learning from Failures

Recognizing and celebrating milestones and achievements along the way reinforces positive behaviors and motivates employees. Additionally, learning from failures and setbacks can help organizations improve their change management processes for future initiatives.

Celebrating Successes



Recognize Individual Contributions

Acknowledge the efforts of team members who played key roles in achieving success to motivate and encourage continued excellence.



Public Recognition

Use meetings, company newsletters, or social media to highlight successes and share them across the organization.



Rewards and Incentives

Offer tangible rewards such as bonuses, promotions, or other perks that reflect the significance of the achievements.



Reflection and Debrief

Conduct sessions to discuss what worked well, reinforcing these practices for future projects.



Document Success Stories

Create case studies or portfolio entries that can be used as references for future projects or marketing materials.

Learning from Failures



Conduct Thorough Reviews

Hold review sessions to dissect what went wrong and identify the root causes of failures without assigning blame.



Promote a Culture of Openness

Encourage an environment where team members feel safe to express concerns and admit mistakes.



Revise Processes

Adjust and improve processes based on the insights gained from failures to prevent future issues.



Share Learnings Organization-Wide

Communicate the lessons learned from failures to the entire organization to prevent repeating the same mistakes.



Resilience Training

Provide training and resources to help team members develop resilience and cope effectively with setbacks.

Want to Learn More?

Our DEI Research Partnership Empowers DEI and HR Leaders Through Today's Toughest Workplace Challenges

What Factors Make DEI and Talent Roles So Challenging?

Tense Workplace Dynamics

- ▶ Shifting demographics lead to competing priorities
- ▶ Evolving legal landscape
- ▶ Divided employee sentiment around socio-political issues

Risk Around Every DEI Decision

- ▶ **Risk of Abandoning Commitments:** Pull-back can cause disengagement and friction
- ▶ **Risk of Inaction:** Holding steady can be perceived as non-commitment
- ▶ **Risk of Misstep:** Forging ahead might turn positive intentions into unintended consequences

Balancing Two Equally Vital Roles

- ▶ Maneuver Corporate and Cultural Risks
- ▶ Safeguard Non-Negotiable DEI Investments

Three Pillars of Service to Support Leaders and Their Teams



Rigorous Research with a Global Reach

Deploying proven research methodology to identify how to make change happen

- ✓ Resources to educate stakeholders and accelerate impact
- ✓ Custom research to answer your up-at-night questions



Collective Experience of a Peer Community

Convening DEI and Talent leaders to guide and shape our search for breakthrough ideas

- ✓ CDO roundtables and experience labs
- ✓ DEI practitioner roundtables and hot-topic webinars



Commitment to Applying Lessons Learned

Facilitating buy-in for change and implementation of lessons learned

- ✓ Access to expert advisors to increase your capacity
- ✓ Partner intensives bring insights to your broader team

This is just the start of what makes a DEI strategy successful. To learn more about how the DEI Research Partnership can advance your strategy, schedule a call with one of our experts.

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ASSESSMENT AND STRATEGY

**Uncover the Real
Levers to Unlock
DEI Progress**

Unfiltered insight into the employee experience powered by innovative technology and over 40 years of DEI data and insights

RESEARCH AND ADVISORY SERVICES

**Set Strong Foundations
and Build Actionable
Roadmaps**

Expert guidance rooted in research and benchmarking to support your strategic talent priorities

LEARNING AND DEVELOPMENT

**Transform Your
Culture by Enabling
DEI at Scale**

Impactful workshops and events that build core leadership competencies at every level

We partner with **450+** corporations, government entities, and nonprofits **globally**.

We guide **~50% of the Fortune 100** and **~25% of the Fortune 500** on their DEI journey.



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