

High-Impact Diversity and Inclusion

Maturity Model and Top Findings

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Top Findings at a Glance

Organizations with inclusive cultures, when compared with organizations that lack inclusive cultures, are:



6x
more likely
to be innovative



6x
more likely
to anticipate change
and respond
effectively



2x
more likely
to meet or exceed
financial targets



Approximately
12%
of surveyed
organizations
have an inclusive culture ...



... while close to
40%
of surveyed
organizations
are primarily focused on
diversity compliance.

Our analysis reveals **six principles** to becoming a more inclusive organization.



Treat D&I as Business-Critical, Not Compliance-Necessary



Move Beyond Diversity to Inclusion and Diversity



Prioritize Inclusive Leadership



Embed D&I into All Talent Practices



Provide D&I Resources That Empower Individuals to Take Action



Drive Accountability, Not Metrics Tracking

Introduction

High-Impact Diversity and Inclusion (D&I)

A Snapshot of Our Methodology*



245
Number of
respondents for
this study



Respondents
were located or
had company
headquarters in
**the United
States
or Canada**



More than
70 interviews
were conducted with
senior D&I leaders in a
variety of industries



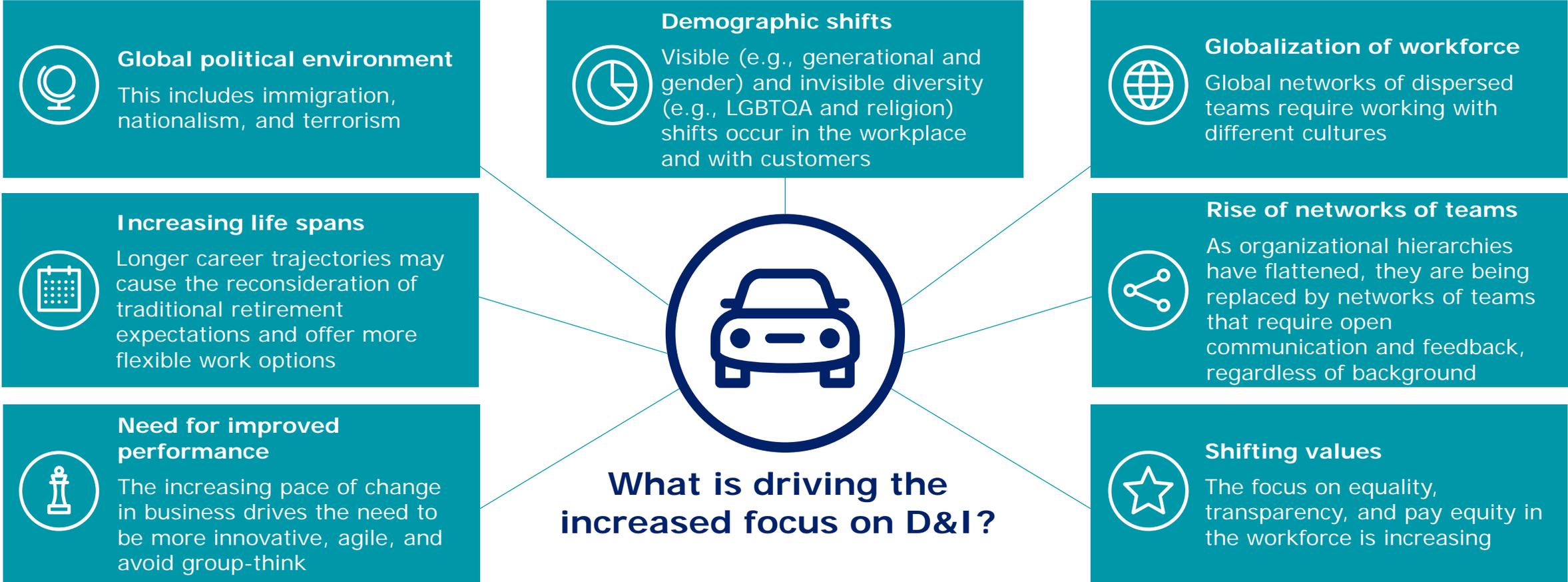
Data was
**analyzed using
a variety of
statistical methods**
including crosstabs, t-tests,
factor analysis, correlations,
and multiple regression

*See ["Research Methodology"](#) for more details.

Trends in Diversity and Inclusion

Why Study D&I Now?

Diversity and inclusion is an increasingly critical issue around the world. The digital organization of today operates as a network of teams, and thrives on empowerment, open dialogue, and inclusive working styles. Leading organizations see diversity and inclusion as a comprehensive strategy woven into every aspect of the talent lifecycle—to enhance employee engagement, improve brand, and drive performance. More than two-thirds (69%) of executives rate diversity and inclusion an “important” issue (up from 59% in 2014).¹



Trends in Diversity and Inclusion

What Can We Do in Our Organizations Today?

Despite the increase in focus on and investment in D&I, many organizations are not becoming more diverse or inclusive. For example, our research found that, while a majority of organizations (71%) aspire to have an "inclusive" culture in the future, only 12% have achieved this standard. This year's *Global Human Capital Trends* research shows that 78% of respondents believe D&I is a competitive advantage.¹ Despite this increased level of interest, only 6% of companies surveyed actually tie compensation to diversity outcomes. Why? Increasing D&I in organizations is dauntingly difficult. Our research and interviews show that effective organizations move beyond training to focus on measurement, transparency, integrated talent processes, and personal accountability to build cultures that are truly inclusive.



What Is an Inclusive Culture?

Our Data Indicates That It Is Comprised of Nine Attributes*

We found that a culture in which employees feel they are valued, safe, empowered to grow, and respected is typically an outcome of having an inclusive culture. Organizations with these attributes perform better on a number of critical outcomes, as shown later in this report.

- Employees feel connected and valued, and that they belong in the culture
- Employees can present their authentic selves

- Employees feel that work outcomes, processes, and communications are fair
- Employees feel they are treated with dignity and regard by others



- Leaders are open to “bad news”
- Asking questions is encouraged
- Leaders are open to new ideas and innovative approaches

- Employees have influence over job tasks
- Teams embrace change
- Employees are frequently given stretch opportunities
- Employees who learn new knowledge / skills are valued

*These nine attributes were identified from our survey. We did not test two items that are also critical—equality and respect. Since these were not in the initial survey, they are not a part of the attributes that predict stronger business outcomes. That said, we believe they are important and would encourage organizations to consider adding them as critical to a culture of inclusion, which is why we have included them here.

What Is an Inclusive Culture? (cont'd)

Our Data Indicates That It Is Comprised of Nine Attributes

- Employees feel connected and valued, and that they belong in the culture
- Employees can present their authentic selves

An inclusive culture requires an environment in which employees feel connected to each other, valued for their unique contributions, that they fit within the culture, and that they can be their authentic selves in the workplace without fear of reprisal.



What Is an Inclusive Culture? (cont'd)

Our Data Indicates That It Is Comprised of Nine Attributes



- Leaders are open to “bad news”
- Asking questions is encouraged
- Leaders are open to new ideas and innovative approaches

An environment that is safe and open means one in which leaders are willing to receive constructive feedback, and employees feel comfortable speaking truth to power and challenging standard methods of operating.

What Is an Inclusive Culture? (cont'd)

Our Data Indicates That It Is Comprised of Nine Attributes



An organizational culture in which employees feel empowered and that they are growing can be created by giving employees autonomy, embracing change, providing stretch opportunities, and rewarding employees for learning new skills.

- Employees have influence over job tasks
- Teams embrace change
- Employees are frequently given stretch opportunities
- Employees who learn new knowledge / skills are valued

What Is an Inclusive Culture? (cont'd)

Our Data Indicates That It Is Comprised of Nine Attributes*

A foundation of an inclusive culture is that individuals feel they are treated fairly and are respected by others.

- Employees feel that work outcomes, processes, and communications are fair
- Employees feel they are treated with dignity and regard by others



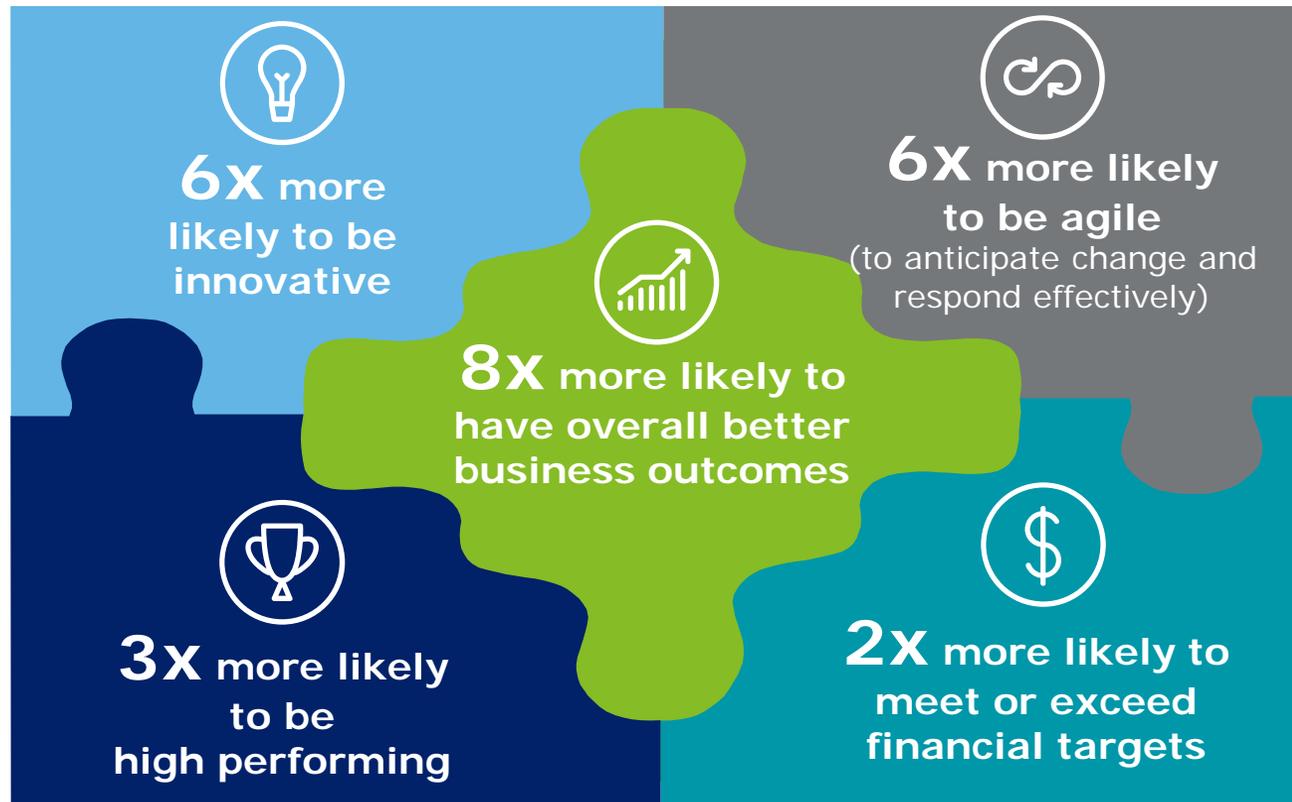
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Impact of Having an Inclusive Culture

More Inclusive Cultures Have Better Business Outcomes*

Organizations with more inclusive cultures (those that perform better on the 9 cultural attributes) are more likely to be innovative, agile, high-performing**, and meet or exceed financial targets. They are also more likely to have overall higher business outcomes (an aggregate score of the 4 individual business outcomes), as compared with organizations which report lower rates of inclusive cultures.

Organizations with inclusive cultures are:



*Outcomes were calculated using odds ratios to determine the likelihood of organizations with inclusive cultures performing better on specific outcome variables.

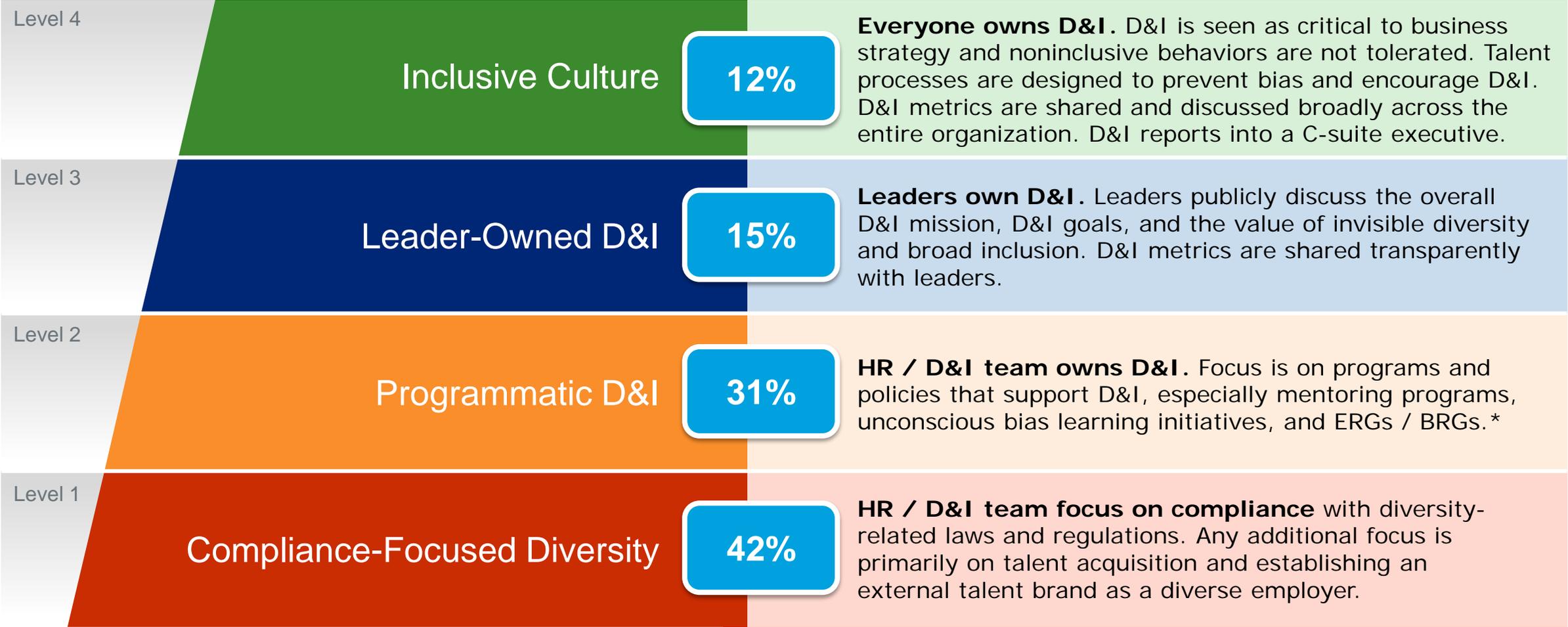
**We asked organizations to indicate the extent to which they are high performing, but did not define this term for them.

A Roadmap to an Inclusive Culture

The Diversity and Inclusion Maturity Model

Our Maturity Model Provides a Roadmap to an Inclusive Culture

The Majority of Organizations Are at Low Maturity



*We recognize that organizations can have ERGs, employee action groups (EAGs), or business resource groups (BRGs). For the sake of simplicity, we are referring to them all as ERGs, but recognize that they may be one of these other group types in organizations. For reference, we define ERGs, EAGs, and BRGs as forums that connect colleagues with a common focus on a specific community to develop leadership roles, management skills, and to help to advance business and talent strategies with a diversity focus.

Understanding the Maturity Model: Level 1

		D&I Strategy	Leader Communication	How Employees Experience D&I	Ownership / Reporting Structure	Metrics
Level 4	Inclusive Culture	D&I is core to the business strategy (drives P&L, innovation, agility)	Focuses on metrics achievement; is part of the overall business conversation	Behaviors are internalized and exhibited	Ownership is everyone / D&I reports into C-suite leader on executive committee	Metrics are transparently shared with all employees
Level 3	Leader-Owned D&I	D&I is important to the business and necessary to attract / retain top talent	Focuses on invisible diversity, overall goals / mission of D&I, and the need for broad ownership	Leaders talk about D&I as an important part of the business strategy	Ownership is business leadership / reports into CHRO on executive committee	Metrics are transparently shared with most leaders
Level 2	Programmatic D&I	Diversity strategy focuses on programs; begins to include inclusion	Focuses on traditional diversity; some discussion of inclusion	D&I training and mentoring programs are offered	Ownership is HR / may have a D&I leader who reports into HR	Metrics are shared on a limited basis, primarily with HR and some senior leaders
Level 1	Compliance-Focused Diversity	Diversity strategy focuses primarily on compliance / belief that it is the "right thing to do"	Focuses on compliance; little broader discussion of diversity	Is limited to basic compliance	Ownership is legal and compliance / reports into HR or legal	Metrics collected and analyzed for compliance only

Focus: Diversity Compliance

Level 1 organizations focus primarily on complying with diversity-related laws and regulations. Diversity is perceived to be "owned" by the diversity team, which is typically staffed by a small team. Interestingly, some in the organization may claim it is doing "great" at diversity because it excels at compliance.

More mature Level 1 organizations may also focus on promoting the organization externally as a diverse talent brand. They may also encourage diversity in a broad swath of talent acquisition activities.

How a Materials Company Focused Its Recruiting to Increase Diversity

Company: This organization is a Fortune 500 company in the general building materials industry. It operates through four divisions—retail, manufacturing and distribution, sales and marketing, and global. The company reported revenue of approximately \$12 billion in 2016.²

Situation: The newly appointed enterprisewide director of diversity and inclusion wanted to focus the company's recruiting efforts on more diverse candidates to increase the diversity of the organization's pipeline, as well as its visibility externally as a diverse organization.

Action: The company took several steps to focus recruiting efforts on more diverse populations. First, the organization updated its external website to reflect a more inclusive organization. Leaders added more visuals, and put the focus on the employees and the training courses offered by this company, such as its management / sales training program, designed to prepare college graduates for a management or sales career within the company. The website highlighted the opportunities for candidates to connect with the company via recruitment activities, such as career fairs and college recruitment. The company is also focusing on diversifying its recruitment sources and candidate pools in an effort to ensure that each open position has a diverse candidate. In the selection process, this organization made strides by increasing the number of hiring managers who view each application. In addition, the company has developed a training module to create awareness for managers around the business case for diversity. This business case includes what an inclusive workplace should entail, and potential unconscious biases in hiring decisions, as well as ways to recognize and avoid them.

Result: To track the progress made on increasing the diversity of its candidate pipeline, the organization implemented a dashboard for each division to compare its diversity standings with other divisions on a quarterly basis. This has been a useful measurement tool to help each division to set diversity goals, and then create a diversity action plan to make sure the goals they put in place are attainable and that they have a strategy to achieve those goals. In 2016, 38.8% of the candidates in the management / sales training program were women and 37.6% were minorities. These steps have increased both the accountability of diversity for managers and the number of candidates in the pipeline, facilitating a path toward a more diverse and inclusive workplace.

Understanding the Maturity Model: Level 2

		D&I Strategy	Leader Communication	How Employees Experience D&I	Ownership / Reporting Structure	Metrics
Level 4	Inclusive Culture	D&I is core to the business strategy (drives P&L, innovation, agility)	Focuses on metrics achievement; is part of the overall business conversation	Behaviors are internalized and exhibited	Ownership is everyone / D&I reports into C-suite leader on executive committee	Metrics are transparently shared with all employees
Level 3	Leader-Owned D&I	D&I is important to the business and necessary to attract / retain top talent	Focuses on invisible diversity, overall goals / mission of D&I, and the need for broad ownership	Leaders talk about D&I as an important part of the business strategy	Ownership is business leadership / reports into CHRO on executive committee	Metrics are transparently shared with most leaders
Level 2	Programmatic D&I	Diversity strategy focuses on programs; begins to include inclusion	Focuses on traditional diversity; some discussion of inclusion	D&I training and mentoring programs are offered	Ownership is HR / may have a D&I leader who reports into HR	Metrics are shared on a limited basis, primarily with HR and some senior leaders
Level 1	Compliance-Focused Diversity	Diversity strategy focuses primarily on compliance / belief that it is the "right thing to do"	Focuses on compliance; little broader discussion of diversity	Is limited to basic compliance	Ownership is legal and compliance / reports into HR or legal	Metrics collected and analyzed for compliance only

Focus: Programs

Level 2 organizations focus on programs and policies that support D&I, especially mentoring programs, unconscious bias learning initiatives, ERGs, and diversity councils. Some companies also begin to offer programs that more generically focus on managing conflict. Leaders also publicly discuss the value of traditional (e.g., legally defined) diversity and begin to talk about inclusion. D&I is seen as being "owned" by HR and the D&I group.

More mature Level 2 organizations may also focus on programs that encourage employees to present their authentic selves and which begin to pilot sponsorship programs.

How Do You Move from Level 1 to Level 2?

Three Ideas for Getting Started

The primary challenge facing Level 1 organizations as they try to move to Level 2 is moving away from a compliance mindset to one in which D&I is valued enough that organizations will invest in D&I programs and policies. To do this, D&I leaders often need to take a top-down and a bottom-up approach—building senior leader support for D&I beyond compliance and beginning to create a broad coalition of employees who will “volunteer” their extra time to support D&I. This approach builds support amongst a range of employees, who can then support the development, implementation, and knowledge transfer of D&I programs and policies.



How a Transportation Firm Built a More Inclusive Company by Providing Resources for Employees

Company: A major transportation company operates an extensive international and domestic network to nearly 350 destinations in more than 50 countries. The company as of 2016 employed more than 100,000 people and had a market capitalization of more than \$41 billion.²

Situation: The merging of the this transportation company with another similar firm created complications with how best to bring together diverse employees spread all around the country. The companies each had either business resource groups (BRGs) or employee resource groups (ERGs) that were integral to the culture of their organizations, and valued by employees for their opportunities to connect with like-minded individuals.

Action: Since the BRGs / ERGs were very popular with employees at each company, the newly formed HR team decided to immediately merge the groups and align them through either a national (single EBRG with system members) or local chapter structure (multiple chapters of an individual EBRG). The groups felt very strongly that it was important to keep both the aspect of employee experience and the aspect of business accountability as part of the resource groups. Therefore, they formed a combined EBRG (employee business resource group) with more than 20 EBRGs focused on different affinities (race, gender, LGBTQA, environment, religion, age, etc.). Each EBRG hosts events throughout its communities to promote the organization, and to engage local constituents in discussing the challenges and opportunities that come with increasing diversity. The organization uses these groups as an opportunity to have difficult conversations, create a more open dialogue between employees, and to make them feel valued and give them a sense of belonging. To maintain that business value for the organization, the company strengthened the role of the diversity advisory council, which includes two employees nominated from each EBRG. Those individuals represent their resource group on a two-year rotational basis and they meet with the diversity advisory council bimonthly. The objective of the diversity advisory council is to maintain clear lines of communication between the resource groups, so that there is collaboration and consistency around how the groups run, operate, and meet the goals of their business plans, and report to the council with their accomplishments. The council is able to make connections for the ERBGs to collaborate with one another, and leverage events and initiatives they want to sponsor either in the community, inside the company in support of team members, or in support of specific business results.

Result: The EBRGs help to enhance the company's global competitiveness and support its strategic business objectives by leveraging employees' diversity. The decision to combine the resource groups allowed the newly merged employees to find common ground through mutual interests, and encouraged continued engagement and commitment to the organization during a time of great change. These groups not only increase employee engagement, but they provide a connection between the organization and the community that attracts new candidates and customers to provide ongoing business value for the company. Due to the success of the EBRGs, The Association of ERGs and Councils recognized the company's diversity advisory council for the 8th consecutive year as a Top 25 in the nation and it is now a part of the exclusive Leaders' Circle for ERGs. The renewed strength of the integrated EBRGs represents a global presence with the addition of numerous international chapter locations, and has a direct impact on the more than 10,000 employees who are members of one or more groups.

How Grainger Uses Mentoring to Help to Fuel Its Focus on Inclusion and Diversity

Company: Grainger, Inc. is a Fortune 500 industrial supply company founded in 1927 in Chicago. The company is a business-to-business distributor of products used to maintain, repair, and operate facilities. Approximately 3 million businesses and institutions worldwide rely on Grainger for products, such as safety gloves, ladders, motors, and janitorial supplies, along with services like inventory management and technical support. These customers represent a broad collection of industries, including healthcare, manufacturing, government, and hospitality. In 1967, Grainger became a publicly traded company and has grown significantly since, reporting \$10.1 billion in sales in 2016.³

Situation: Grainger has a broad customer base and the communities that it serves are very diverse. The company believes that, to build strong relationships and provide excellent service, its 16,000 employees in the United States should reflect the diversity of its customers. The company accomplishes this by building a more diverse talent pipeline, and by fostering a culture of diversity and inclusion across the organization. Grainger provides resources for employees to connect with those outside of their immediate networks, including others with more experience or at similar career levels.

Action: To assess its diversity needs, Grainger examined its levels of diversity for critical roles and its talent pipeline to uncover potential areas of focus. The company also assessed the diversity of employees at all levels, with a focus on improving representation, particularly at the top. To that end, it developed an internal mentoring program, as one approach to increase the visibility and opportunities for diverse individuals to grow and succeed in the organization.

Employees interested in participating in the mentoring program must go through a rigorous application process to determine their eligibility. Then they are matched with a mentor who is a more senior leader and who will provide a unique perspective for the mentee. Grainger also launched peer mentoring as an option to allow employees to learn about other areas of the business with which they might not be familiar, while collaborating with someone from a different background. In addition, the company offers reverse mentoring, so that Millennials can provide different perspectives and knowledge to senior leaders, including valuable insights about technology and social media. Last year, collectively, the various mentoring programs offered 116 mentorship opportunities.

Result: Grainger believes there is value in allowing employees to connect for mentoring purposes, as it has a business impact. Thus far, the company has found that individuals who participate in its mentoring program are more likely to have a robust, actionable development plan, more likely to be highly engaged, and more likely to remain with the organization. Grainger has been recognized by Fortune as one of the *Worlds Most Admired Companies*, and has been ranked #1 in its category for the last 4 years. The company has also achieved a perfect score on the *Human Rights Campaign Corporate Equality Index* for the last 3 years.

Understanding the Maturity Model: Level 3

		D&I Strategy	Leader Communication	How Employees Experience D&I	Ownership / Reporting Structure	Metrics
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Focus: Leaders' Ownership

In Level 3 organizations, leaders own D&I. Leaders publicly discuss the organization's overall D&I mission, goals, and the value of invisible diversity and broad inclusion. Leaders have access to and discuss D&I metrics and goals. D&I policies, programs and resources are expanded and refined. Talent acquisition processes are adjusted to encourage the recruitment of talent with invisible diversity; biases in those processes are identified and addressed.

More mature Level 3 organizations begin to share metrics transparently with employees, include considerations of bias in succession planning discussions, and integrate D&I concepts into coaching programs.

How Do You Move from Level 2 to Level 3?

Three Ideas for Getting Started

The primary challenge facing Level 2 organizations as they try to move to Level 3 is engaging leaders, so they recognize that D&I is not the responsibility of HR, a dedicated D&I group, or even the programs or policies in place. Leaders in Level 3 organizations need to understand that they own D&I. They should talk about it publicly and privately; they should take actions that show their real and serious support of it; and they should discuss D&I metrics with their peers (at a minimum) and start to hold each other accountable for them.

Ideas for Getting Started

Sample Specific Activities



Provide leaders with stories and other resources to talk about the positive impact of D&I in the organization

- Work with BRGs / ERGs to identify examples of how D&I has positively impacted employees or the business
- Collaborate with people analytics teams to identify and compare business outcomes (e.g., revenue, customer satisfaction, time to market) of more and less diverse or inclusive teams



Identify specific activities—especially critical decision points—that leaders can use to reinforce their D&I commitment and make them aware of these opportunities

- Make leaders aware of critical decision points that affect the representation levels within the talent pipeline (e.g., candidate slates, succession slates, promotion decisions, leadership development opportunities)
- Provide leaders with relevant information during these critical decision points



Share D&I metrics with leaders, and provide guidance on what and with whom they can share information

- Identify D&I metrics critical to understanding D&I in the organization
- Develop dashboards and tools that will enable leaders to access data in real-time and continuously
- Develop and distribute guidelines on those with whom certain types of D&I metrics can be shared

Understanding the Maturity Model: Level 4

Focus: Everyone's Ownership

In Level 4 organizations, everyone owns D&I and it is seen as critical to the business strategy. In fact, D&I is so important and embedded into the organization that noninclusive behaviors are not tolerated within the culture, similar to how safety, fraud, or legal issues are not tolerated. Talent processes / policies are designed to prevent bias, and encourage diverse and inclusive behaviors. Extensive coaching, mentoring, and sponsoring programs are offered. D&I metrics are shared transparently with leaders and employees, and progress on them is regularly discussed. Leaders are held responsible for achievement of those metrics. D&I reports into a C-suite executive.

Level 4 organizations can face challenges creating sustainability and ongoing growth of their D&I efforts to continue to support the culture.

		D&I Strategy	Leader Communication	How Employees Experience D&I	Ownership / Reporting Structure	Metrics
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How do you move from Level 3 to Level 4?

Three Ideas for Getting Started

The primary challenge facing Level 3 organizations as they try to move to Level 4 is embedding D&I as a business value. While Level 3 leaders may understand the importance of D&I, they may still talk about it as being separate from the organization's business strategy. Further, line employees lower in the organizational hierarchy may not be aware of the importance of D&I to the organization's business. To begin to make this transition, it is important to communicate the criticality of D&I by consistently messaging the impact of D&I through both formal communications and reporting relationships. In addition, organizations can build in an awareness of bias into critical talent activities, so all employees are reminded of the importance of managing bias. Finally, leaders need to be held accountable for improvement on D&I metrics (which can and likely should go beyond just representation), similar to how they are held accountable for other business metrics.

Ideas for Getting Started



Communicate in a variety of forums that D&I is business-critical



Build in processes to address bias in critical talent activities



Hold leaders at all levels accountable for improvement on D&I metrics

Sample Specific Activities

- Adjust D&I's reporting line, so that a C-suite executive is ultimately responsible for it
- Publicize specific examples of how and why D&I is core to business strategy
- Enhance public support of diversity and inclusion efforts, internal and external to the organization

- Create processes that encourage leaders to consider bias when determining stretch goal assignments, conducting succession planning, and assessing talent
- Integrate D&I competencies into talent management practices and specifically coaching programs

- Share diversity metrics with all employees
- Tie a portion of senior leader compensation to D&I metric achievement
- Create a D&I steering committee that will advise the board of directors and internal leaders on their D&I practices

How General Mills Makes Diversity and Inclusion Everyone's Responsibility

Company: General Mills is a global manufacturer and marketer of branded consumer foods sold through retail stores, and is headquartered in Minneapolis, Minnesota. The company markets many well-known North American brands, and its brand portfolio includes more than 90 leading U.S. brands and numerous category leaders around the world. General Mills is the world's sixth-largest food company with annual net sales of \$16.6 billion worldwide.⁴

Situation: The chief diversity officer (CDO) is responsible for creating a culture of inclusion throughout the organization in which everyone feels as though D&I is their responsibility, not just that of HR or senior leaders.

Action: In order to create an inclusive culture in which D&I is everyone's responsibility, the chief diversity officer works together with the director of culture and inclusion, as well as with subject-matter experts in each function, to drive diversity and inclusion within functions or segments. The D&I agenda is set by the CDO in partnership with the CEO and CHRO, who meet quarterly to set annual objectives and goals, and then follow through, throughout the year, to make sure that they are making progress. The company also has an executive diversity council that is comprised of all of the senior management teams that report into the CEO, who meet quarterly as well to drive performance across the organization.

Members of the senior management team have a D&I scorecard for their area of responsibility. Scorecards set goals for recruiting, turnover, and promotion rates. They give senior leaders an opportunity to have a conversation about their top talent, what they are doing to advance and support them, and what the priorities are for diversity and inclusion within their particular function / segment. Meeting with other members of the management team helps them to focus on what is most important within their particular area of the organization. Each member of the management team has his / her own individual diversity scorecard and some of those items are in their priorities as well. In addition, there is accountability for the CDO who has D&I goals and objectives to deliver on, which connect into both the goals of the CHRO and CEO as well as the board of directors.

(cont'd on next page)

How General Mills Makes Diversity and Inclusion Everyone’s Responsibility (cont’d)

Result:

General Mills has seen an increase in its minority officer representation from 13.8% to 20.2%. Today, women lead 50% of its global business groups (enterprise-level P&L roles). Women account for more than one-third of the company’s officers and more than 50% of its U.S. professional employees.

Further, because of the company’s commitment to diversity and inclusion, General Mills has received many awards and recognitions as an employer of choice.⁵

<ul style="list-style-type: none"> • 100 Best Companies to Work For, <i>Fortune</i> 	<ul style="list-style-type: none"> • Best Companies for Working Mothers, <i>Working Mother Magazine</i>
<ul style="list-style-type: none"> • Best Companies for Multicultural Women, <i>Working Mother Magazine</i> 	<ul style="list-style-type: none"> • Top Companies for Executive Women, <i>National Association of Female Executives</i>
<ul style="list-style-type: none"> • Best Places for LGBT Employees, Human Rights Campaign 	<ul style="list-style-type: none"> • 40 Best Companies for Diversity, <i>Black Enterprise Magazine</i>
<ul style="list-style-type: none"> • Top 50 Companies for Diversity, <i>DiversityInc</i> 	<ul style="list-style-type: none"> • 50 Best Companies for Latinas, <i>Latina Style Magazine</i>

Six Principles for Building an Inclusive Culture

Six Principles⁶ for Shifting from “Delivering D&I Programs” to “Building an Inclusive Culture”

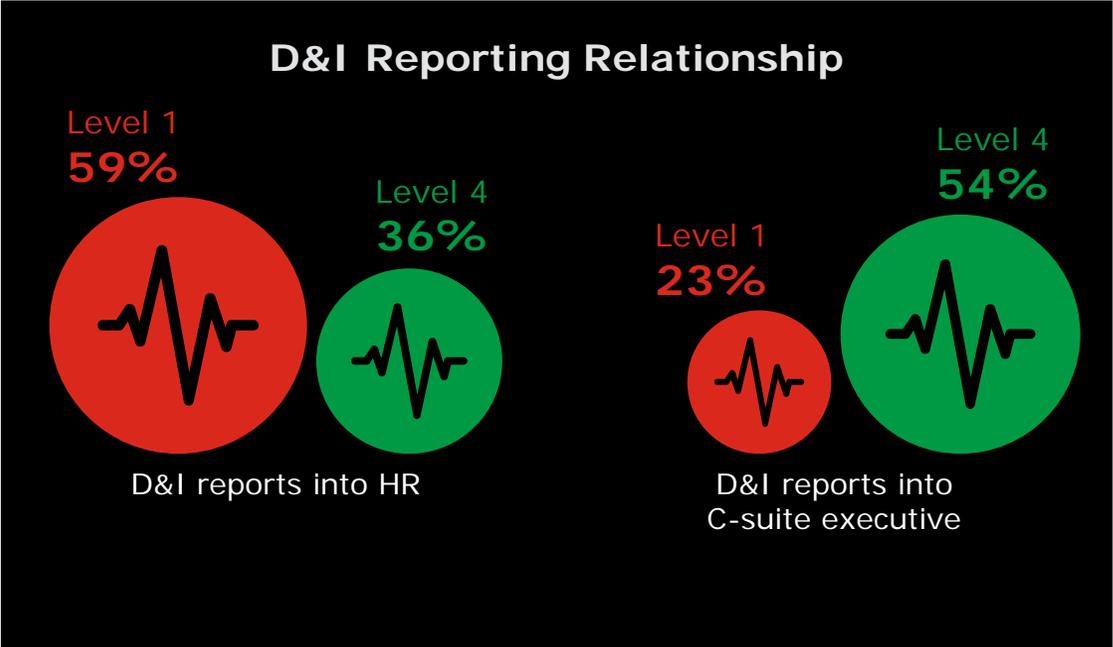
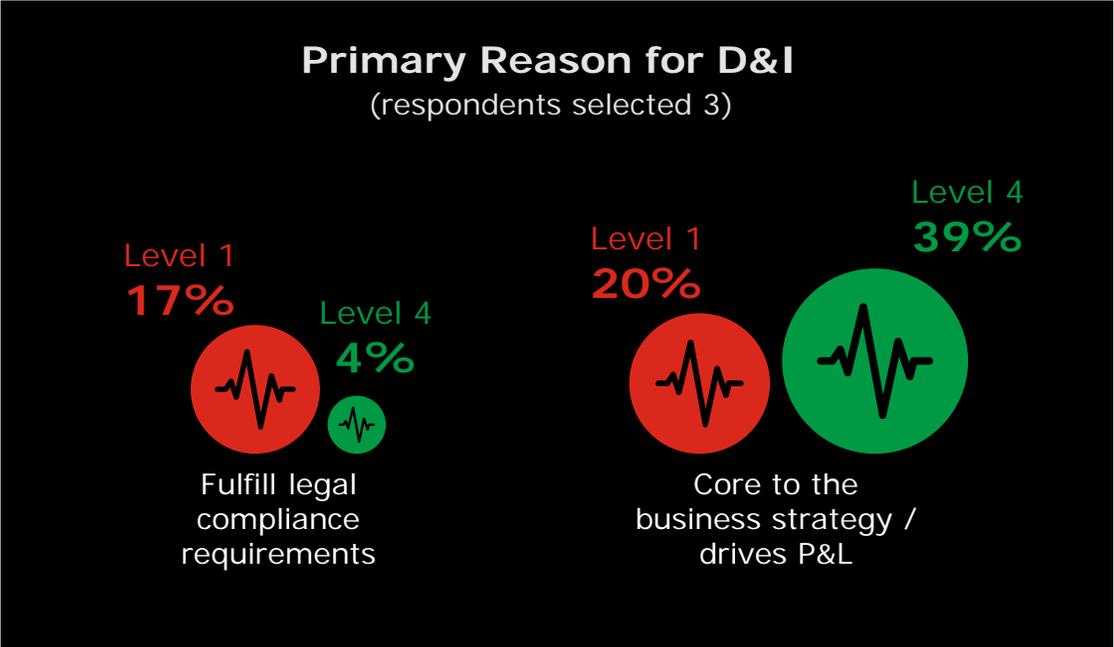


Principle 1: Treat D&I as Business-Critical, Not Compliance-Necessary

Organizations That Approach D&I as a Business Priority Are Much More Likely to Be High in Maturity and to Report Superior Business Outcomes

Mature talent organizations are more likely to view D&I as core to business strategy / drive P&L and more likely to have it report into a C-suite executive. Interestingly, even if a Level 4 organization has D&I report into HR, it is common for it to report into the head of HR who is also a C-suite executive. In short, these organizations are treating D&I as business-critical, in terms of how they view it, and the level of accountability and visibility they put on it.

Further, in our High-Impact Talent Management research, we found organizations that align their D&I strategy with their business objectives and which connect senior leader compensation with achievement of D&I goals are approximately twice as likely to be innovative and anticipate change, and 3 times more likely to be highly effective at coaching people for higher performance, and identifying and developing leaders.⁶



How Timken Connects D&I Strategy to Business Needs via Associate Resource Groups

Company: The Timken Company is a global manufacturer of bearings, and related components and assemblies, which operates in 28 countries. Founded in Missouri in 1899 by Henry Timken, its current headquarters are in Ohio with 187 locations around the world. In 2014, the company reported an annual revenue of \$3 billion.²

Situation: It is critical to Timken's leaders that they connect the D&I strategy to business needs. With that in mind, the company has developed a D&I strategy around three pillars—the workplace, the workforce, and the marketplace. Within the workplace, the company believes that it needs an inclusive culture; strong leadership; and to see D&I in the work environment, core values, and development of its people. To have diversity and inclusion in the workforce, Timken looks at teams, employment brand, and prospective talent, and sees itself as a community advocate. As the company views the marketplace with regard to diversity and inclusion, it considers customers and shareholders, communities, partners, suppliers, and others.

Action: One of the ways Timken ties its D&I strategy to business needs is through its associate resource groups, which are active in both the organization and the community. The company has three associate resource groups (gender, ethnicity, and generational) and each has its own business plans which are tied to the D&I strategy. The resource groups help to support diversity and inclusion across the organization since Timken currently does not have a formal D&I department. The resource groups provide opportunities for people to play different roles, while establishing a sense of shared responsibility for diversity and inclusion throughout the organization.

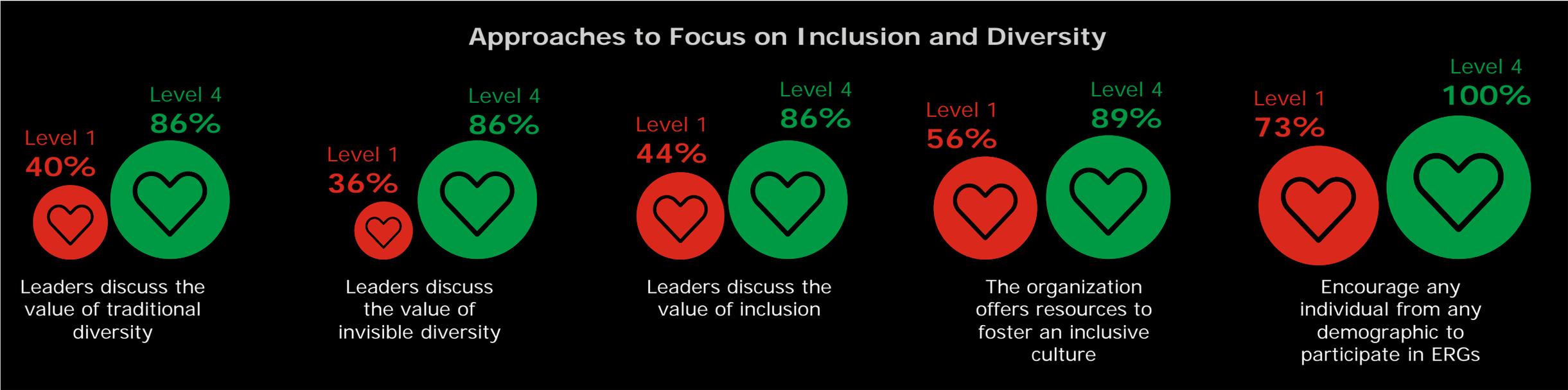
Result: To track the effectiveness of the associate resource groups, Timken conducts periodic surveys to obtain feedback on their success and which initiatives employees would like to see implemented or expanded (i.e., mentoring activities and driving more communication throughout the organization). Based on employee feedback from the survey, company leaders have begun holding roundtable meetings monthly with executive leaders, so that the associates have the opportunity in smaller groups to meet with them and talk openly. In addition, the company is implementing rotating skip level meetings. For example, the vice president of finance holds a skip level meeting with the finance group, and the next month, she meets with the engineering group and then the HR group, and it rotates so that more associates gain exposure to senior leaders. The associate resource groups have enabled more direct communication within the organization about D&I, as well as overall business needs. Employees see the associate resource groups as an example of how Timken is providing an opportunity to address D&I concerns, while the associate resource groups allow leaders to connect D&I to the organization's business strategy.

Principle 2: Move Beyond Diversity to Inclusion and Diversity

Organizations That Focus on the Value of Inclusion and Invisible Diversity—in Addition to Traditional Diversity—Have Superior Performance as Compared with Those That Do Not

One of the key themes from our interviews of mature organizations is that, while they are focused on recognizing and valuing employees' diversity, they put an equal if not greater focus on encouraging inclusion. As one interviewee put it, "It's not enough for us all to be like different instruments—we have to be able to work together and play as a symphony." This mindset is a hallmark of mature organizations.

Our data backs up this, as indicated by the topics of leaders' discussions in mature organizations. While these leaders still talk about the value of traditional diversity, they also discuss the value of invisible diversity and of inclusion. Specifically, mature organizations are 3 times more likely to have leaders discuss the value of inclusion than less mature organizations and mature organizations are 2 times more likely to have leaders discuss the value of invisible diversity than less mature organizations. These organizations are also focused on promoting inclusiveness more broadly, by offering resources and encouraging broad participation (regardless of demographic) in ERGs.

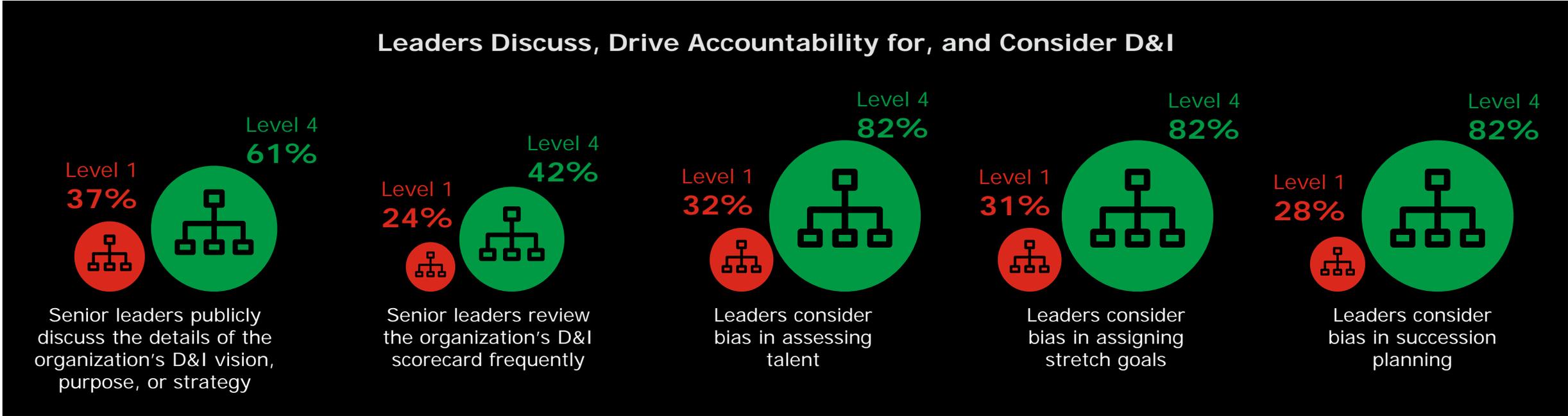


Principle 3: Prioritize Inclusive Leadership

Leaders Play a Critical Role in the Creation of an Inclusive Culture⁸

Leaders who are personally committed to and demonstrate inclusive behaviors are a hallmark of a mature organization. Leaders at Level 4 organizations should be capable of discussing and modeling diverse and inclusive behaviors and activities. Further, should be held accountable for driving real change in an organization. We found that Level 4 organizations are more likely to have leaders who publicly discuss both traditional and invisible D&I, and consider bias in assessing talent, succession planning, and stretch goals.

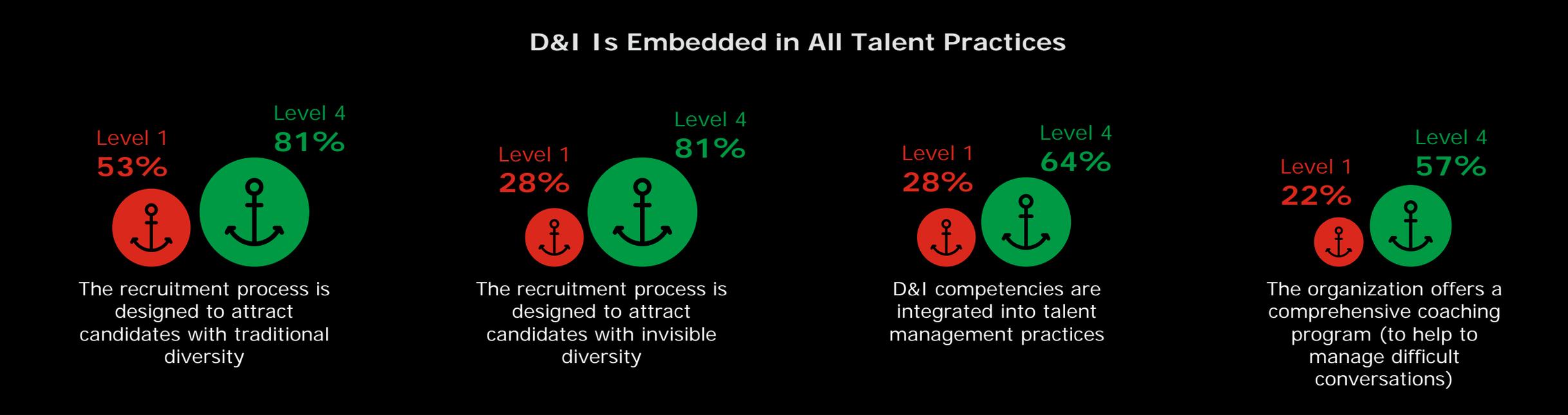
Level 4 organizations are twice as likely to have leaders discuss the details of the D&I mission, and encourage leaders to consider bias in assessing talent, determining stretch goal assignments, and in succession planning than Level 1 organizations.



Principle 4: Embed D&I into All Talent Practices

Reinforce an Inclusive Culture Every Day

Mature D&I organizations take a comprehensive approach to creating an inclusive culture, with programs being just one aspect. These organizations also focus on integrating D&I concepts into talent acquisition, capability development, and other talent processes. For example, Level 4 organizations are twice as likely to integrate D&I competencies into talent management practices as Level 1 organizations. In our High-Impact Talent Management research, we found similar strong relationships. In the study, we found that organizations which integrated D&I, and performance management and succession management are nearly twice as likely to be highly effective at innovation and anticipating change and responding effectively.⁷ The point is to reinforce the importance of inclusion every single day.



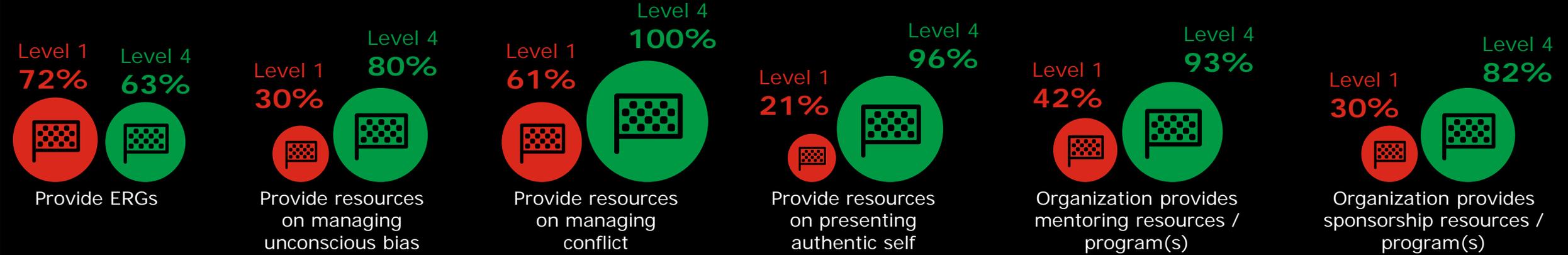
Principle 5: Provide D&I Resources That Empower Individuals to Take Action

Offer These Resources to All Employees—Not Just Diverse Populations

While many organizations rely on ERGs to help diverse talent to navigate organizations, the mere existence of these groups is not adequate to either spur or enable people to take action on their own needs or to respond differently in situations they may encounter. More mature organizations provide resources that enable individuals to take actions in their daily lives that are different than they would have without those resources. In this way, creating a diverse and inclusive organization becomes a personal mission that includes activities and behaviors individuals can engage in, as opposed to an initiative they can simply be aware of.

Our analysis reveals that mature organizations are 3 times as likely to provide resources on managing unconscious bias and twice as likely to provide resources on managing conflict as Level 1 organizations. In addition, through our interviews, we heard that inclusive organizations are more likely to design flexible work arrangements and career paths which can accommodate professionals who need an alternative approach to their work due to personal or family obligations. Further, in their effort to be inclusive—versus reinforcing differences—more mature organizations tend to offer these resources broadly, not just for diverse populations.

D&I Resources Targeted at Enabling Individual Action

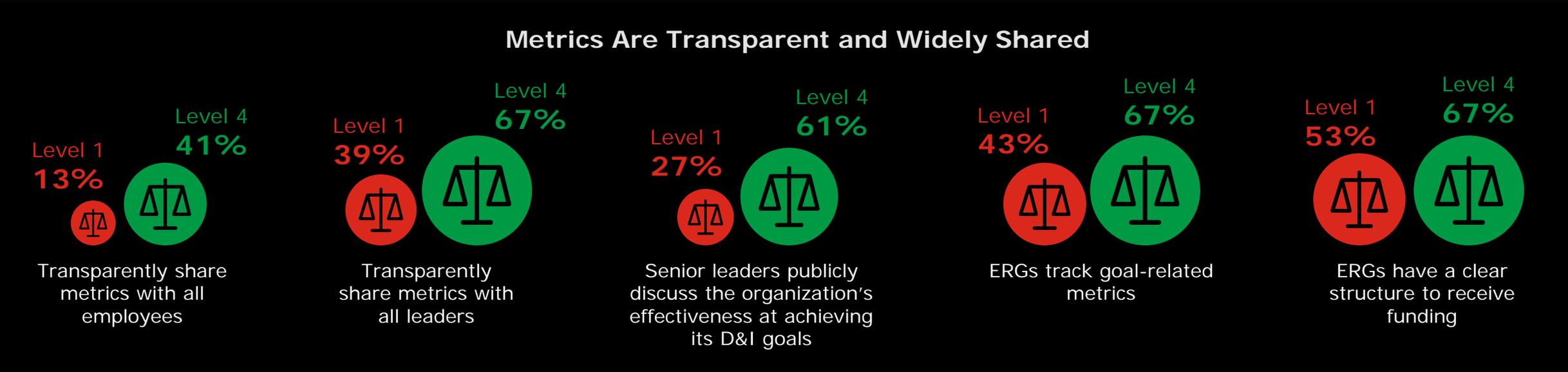


Principle 6: Drive Accountability, Not Metrics Tracking

Move Beyond Tracking Data to Discussing and Doing Something About It

While many organizations may track D&I-related metrics, that is not enough. Instead, it is important for organizations to create accountability by sharing metrics and goals throughout the organization, having senior leaders discuss goal achievement on an ongoing basis, and having ERGs reinforce the importance of D&I being business-focused via tracking their goals, and having to justify their budget and spending. It is important to note that not all D&I metrics and goals should be representation metrics, as these are simply outcomes of other activities and behaviors. Instead, the organization should also be tracking—and holding leaders accountable for—some of those activities and behaviors that can have an impact on representation (i.e., participation in events or programs that encourage diversity and inclusion, mentoring, or sponsoring diverse employees).

In our High-Impact Talent Management research, we also observed the importance of tying senior leaders' compensation to the achievement of D&I goals. A full 62% of Level 4 organizations (which we labeled as having an "Inclusive Talent System") made this connection. These organizations were approximately twice as likely to be innovative and agile, and 3 times more likely to be highly effective at coaching people for higher performance, and identifying and developing leaders, as compared with organizations that did not make the compensation connection.⁶



How S&P Global Is Increasing D&I Transparency with Employees

Company: S&P Global (previously McGraw-Hill Financial, Inc.), founded in 1888 by James McGraw and John Hill, is an American publicly traded corporation headquartered in New York City. Its primary areas of business are financial information and analytics. It is the parent company of S&P Global Ratings, S&P Global Market Intelligence, and S&P Global Platts, and is the majority owner of the S&P Dow Jones Indices joint venture. The company has approximately 22,000 employees in more than 31 countries globally with revenue of \$5.67 billion as of 2016.⁹

Situation: The chief diversity officer (CDO) is tasked with driving the D&I strategy for the organization, articulating a D&I vision and key messaging, and defining the right qualitative and quantitative success metrics. This involves looking at diversity through a wide lens, starting with the employee lifecycle, beginning with applicant slates, interview slates, offers made and accepted, promotions, mentoring, recognition and leadership development opportunities, and overall retention.

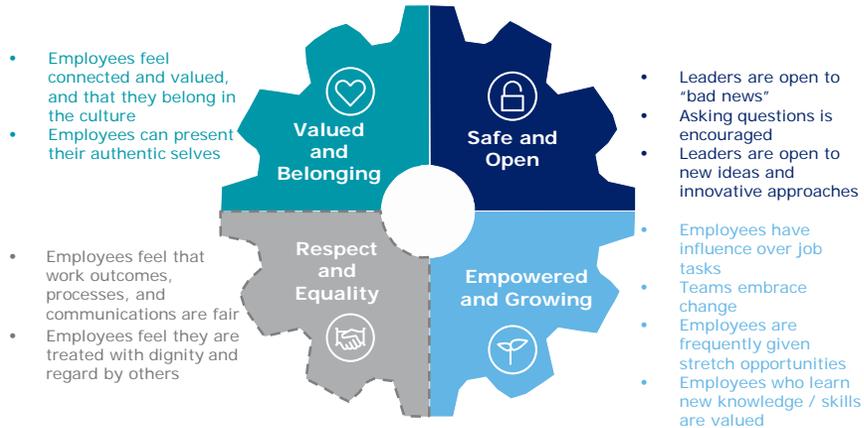
Action: Diversity and inclusion is tracked through the talent acquisition (including campus recruiting), talent development, and recognition functions, with full support of the in-house HR insights and analytics experts. Results are shared in HR quarterly function reviews with the CEO and executive team. Diversity data is reviewed twice a year in divisional talent reviews with the respective presidents and HR leaders. In addition, participation in the company's ERGs is tracked to measure overall engagement and impact made through its workshops and programming. The D&I office conducts an annual survey of ERG members, volunteers, and executive sponsors to track impact and help to shape future plans.

In April 2017, the CDO presented a full D&I update to the S&P Global board of directors. Annual employee engagement surveys track employee sentiment on D&I dimensions, and are reported to the senior executive team and their direct reports for action-planning and follow-up with employees.

In May 2017, the company is due to introduce a more comprehensive D&I annual report, sharing progress on all elements of its D&I strategy. The report is designed to share specific examples of how D&I is present both inside the organization, as well as externally in the communities S&P Global serves. Internally, employees have greater access to D&I resources and information through an enhanced intranet site, monthly distribution of a dedicated e-newsletter called DIscovery, and a blog focused on sharing personal D&I stories from employees of all levels across the D&I council and ERG leader groups. Inclusion is a driving force at S&P Global. One example is "skip level" breakfasts and lunches during which the most senior executives (who report to the CEO) regularly host informal discussions with employees of their direct reports.

Result: The new D&I report, along with an extensive D&I internal communications program, represent a strong commitment to greater transparency around diversity and inclusion. An example of increased employee engagement is a 52% year-over-year increase in ERG membership. Another example signifying S&P Global's commitment to diversity and inclusion is the notable increase in senior women on its senior executive operating committee and on the S&P Global board of directors. The company is a proud member of the 30% Club, an initiative started in the United Kingdom in 2010, now global, that encourages companies to increase the female representation on their executive teams and boards.

Conclusion



Inclusive organizations are characterized by 9 attributes, that can be summarized as valued and belonging, safe and open, and empowered and growing.

When compared to the least inclusive organizations, inclusive organizations tend to be:

- 6 times more likely to be innovative and agile
- Twice as likely to meet or exceed financial targets



The Bersin by Deloitte Diversity and Inclusion Maturity Model offers a roadmap for organizations trying to become more inclusive. Its four levels are:

- Level 1: Compliance-Focused Diversity
- Level 2: Programmatic D&I
- Level 3: Leader-Owned D&I
- Level 4: Inclusive Culture



Based on our analysis, we have identified six principles that organizations can use as they attempt to become more inclusive:

1. Treat D&I as Business-Critical, Not Compliance-Necessary
2. Move Beyond Diversity to Inclusion and Diversity
3. Prioritize Inclusive Leadership
4. Embed D&I into All Talent Practices
5. Provide D&I Resources That Empower Individuals to Take Action
6. Drive Accountability, Not Metrics Tracking

Diversity and Inclusion Maturity Model¹⁰



Our Maturity Model Is Built on 8 Factors and 28 Dimensions

These Items Are the Building Blocks of the D&I Maturity Model

#	Maturity Factors	Maturity Dimension
1	D&I Strategy	D&I is core to business strategy / drives P&L / innovation / agility
2	D&I Strategy	D&I helps to build brand externally and delivers on our belief that D&I is the right thing to do
3	D&I Governance	D&I is staffed by a group of full-time dedicated employees (primarily focused on compliance)
4	D&I Governance	D&I is enabled by dedicated employees tightly integrated with an active employee community
5	Reporting Structures	D&I reports into the CHRO
6	Reporting Structures	D&I reports into another C-suite executive
7	Talent Acquisition	Leaders are encouraged to source candidates from diverse networks
8	Talent Acquisition	The organization promotes itself as a diverse / inclusive organizational brand
9	Talent Acquisition	The recruitment process is designed to attract those with traditional diversity
10	Talent Acquisition	The recruitment process is designed to attract those with invisible diversity
11	L&D Resources	The organization offers resources to foster an inclusive culture
12	L&D Resources	The organization provides resources for managing conflict
13	L&D Resources	The organization provides resources for managing bias
14	L&D Resources	The organization provides resources for presenting authentic self
15	L&D Resources	The organization provides resources for mentoring
16	L&D Resources	The organization provides resources for sponsoring
17	PM / SP Integration	The organization has a comprehensive coaching program
18	PM / SP Integration	The organization has integrated D&I competencies in talent management practices
19	PM / SP Integration	The organization encourages leaders to consider bias in assessing talent
20	PM / SP Integration	The organization encourages leaders to consider bias in conducting succession planning
21	PM / SP Integration	The organization encourages leaders to consider bias in determining stretch goal assignments
22	Leader Communication	Leaders discuss the value of traditional diversity
23	Leader Communication	Leaders discuss the value of invisible diversity
24	Leader Communication	Leaders discuss the value of inclusion
25	Leader Communication	Leaders discuss the details of the organization's D&I vision, purpose, or strategy
26	Leader Communication	Leaders discuss D&I goal achievement
27	Metrics Communication	The organization has transparent metrics that are shared with leaders
28	Metrics Communication	The organization has transparent metrics that are shared with employees

The Individual Dimensions of the Model Are Most Prevalent at Different Maturity Levels

Level 4 Organizations Are Much More Heavily Focused on Integrating D&I Principles—Especially Around Bias—into Talent Practices

Factor	Dimension Name	Maturity Level
L&D Resources	The organization provides resources for presenting authentic self	Level 4
PM / SP Integration	The organization encourages leaders to consider bias in conducting succession planning	Level 4
L&D Resources	The organization provides resources for sponsoring	Level 4
PM / SP Integration	The organization encourages leaders to consider bias in determining stretch goal assignments	Level 4
PM / SP Integration	The organization has a comprehensive coaching program	Level 4
PM / SP Integration	The organization encourages leaders to consider bias in assessing talent	Level 4
PM / SP Integration	The organization has integrated D&I competencies in talent management practices	Level 4
Leader Communication	Leaders discuss D&I goal achievement	Level 4
Metrics Communication	The organization has transparent metrics that are shared with employees	Level 4
Reporting Structures	D&I reports into CEO or COO	Level 4
D&I Strategy	D&I is core to business strategy / drives P&L / drives innovation / agility	Level 4
D&I Governance	D&I is enabled by dedicated employees tightly integrated with an active employee community	Level 4
Leader Communication	Leaders discuss the value of inclusion	Level 3
Talent Acquisition	The recruitment process is designed to attract those with invisible diversity	Level 3
Leader Communication	Leaders discuss the value of invisible diversity	Level 3
Metrics Communication	The organization has transparent metrics that are shared with leaders	Level 3
Leader Communication	Leaders discuss the details of the organization's D&I vision, purpose, or strategy	Level 3
L&D Resources	The organization provides resources for managing bias	Level 2
L&D Resources	The organization provides resources for mentoring	Level 2
Leader Communication	Leaders discuss the value of traditional diversity	Level 2
L&D Resources	The organization provides resources for managing conflict	Level 2
L&D Resources	The organization provides resources for an inclusive culture	Level 2
Talent Acquisition	The recruitment process is designed for traditional diversity	Level 1
Talent Acquisition	Leaders are encouraged to source candidates from diverse networks	Level 1
Talent Acquisition	The organization promotes itself as a diverse / inclusive organization brand	Level 1
D&I Strategy	D&I helps to build brand externally and delivers on it being the right thing to do	Level 1
D&I Governance	D&I staffed by a group of full-time dedicated employees (primarily focused on compliance)	Level 1
Reporting Structures	D&I reports into HR	Level 1

Our analysis shows that many dimensions within certain factors clump at different levels (e.g., talent acquisition at Level 1, D&I programs at Level 2, leader communication at Level 3, and performance management / succession planning integration at Level 4). This clumping was derived from our analysis of organizations' average scores on each dimension within each level of maturity.

Research Methodology

This study is part of a research initiative launched by Bersin by Deloitte in June 2013. As part of that initiative, we conducted a detailed secondary literature review, interviewed close to 50 diversity and inclusion executives and thought leaders, and developed a detailed online survey.

The online survey was conducted from December 2013 to January 2014, when contacts from the databases of Bersin by Deloitte and Deloitte Canada were emailed invitations to participate in an online survey. The survey collected data from those responsible for diversity and inclusion efforts in the United States and Canada. The final count of qualified respondents is 245. The initial findings of this study were published in spring 2014.

We then began a more detailed analysis of the dataset, so as to identify relevant factors and dimensions that would predict meaningful outcomes. We identified 10 factors (8 independent and 2 dependent). We initially hypothesized that the data would use a path model, whereby management practices would drive D&I practices, which would drive culture, which would drive business outcomes. While there were clear relationships in the latter part of the model (culture to business outcomes), the path analysis was not adequately strong on the front of the model for us to draw meaningful conclusions.

In fall 2016, we reinitiated analysis of this dataset. We ran regression analyses (forward, backward, and step-wise), using the items within the factors identified previously, as well as others that were hypothesized as meaningful. Given our previous analysis, we regressed the independent variables on the outcome factor of culture, as we already knew a strong relationship existed between culture and business outcomes (the two dependent variables). We ultimately chose backward regression as forward regression models were too heavily influenced by the initial variables entered and the stepwise regression was removing variables that limited the final model so much as to impact its practicality. Further, both of the models generated by these analysis types were less predictive than our final choice. The final model chosen had an adjusted R^2 of .480.

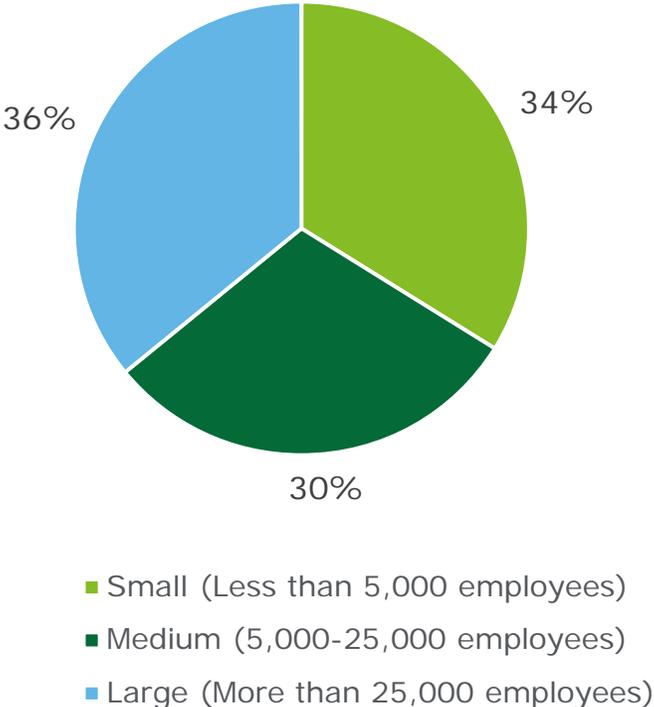
Using this model, we identified the maturity model score for each organization. We then analyzed the grouping of the maturity scores—and the changes in the different variables (now called dimensions) to determine the appropriate levels for the different levels within the model. The result is our four-level maturity model. Finally, we analyzed each dimension to determine the level at which it became most prevalent. This analysis was also informed by our interviews and secondary literature review.

While conducting this analysis, we conducted another literature review to understand any changes that may have occurred since the beginning of the research initiative. We also conducted 20 one-hour in-depth interviews with D&I leaders at companies in a variety of industries and of various sizes, as well as briefings with organizations offering D&I software or service solutions. In addition, we sought the feedback of our Deloitte colleagues.

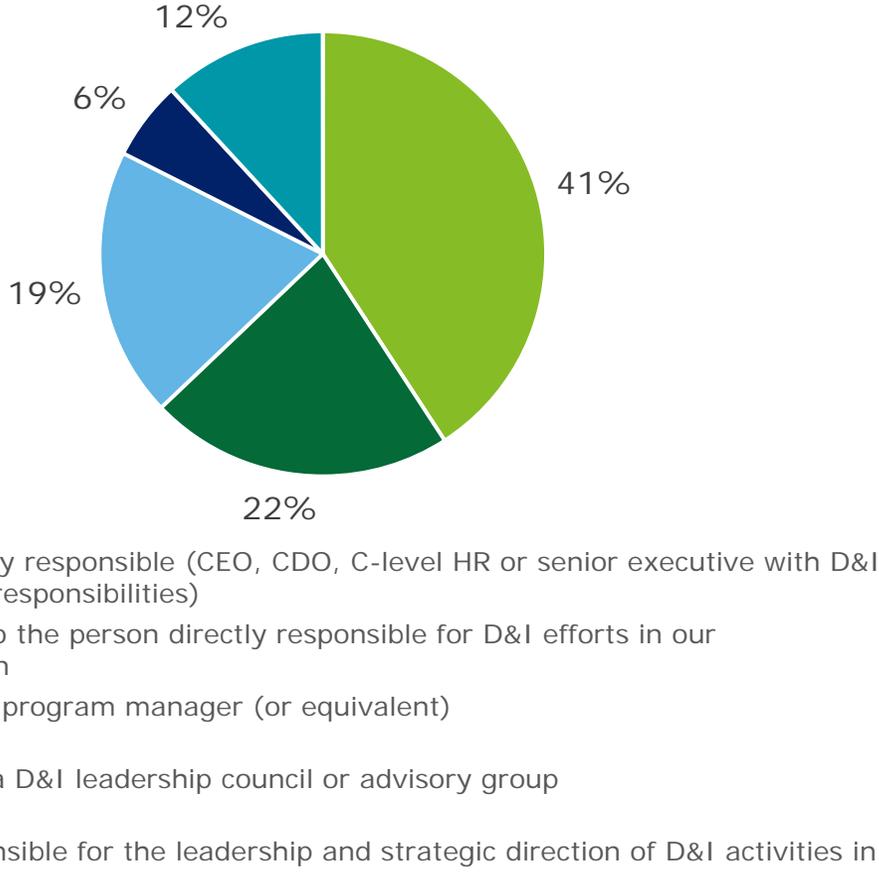
High-Impact Diversity and Inclusion Survey Demographics

Organization Size and Respondent Role

Organization Size



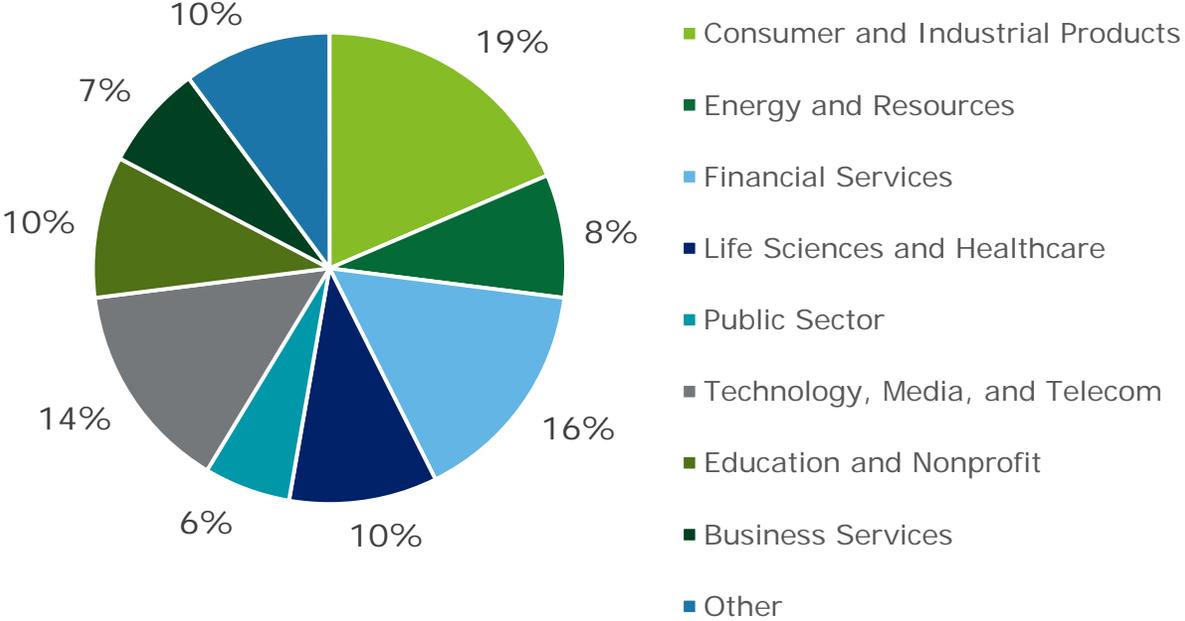
Respondent Role



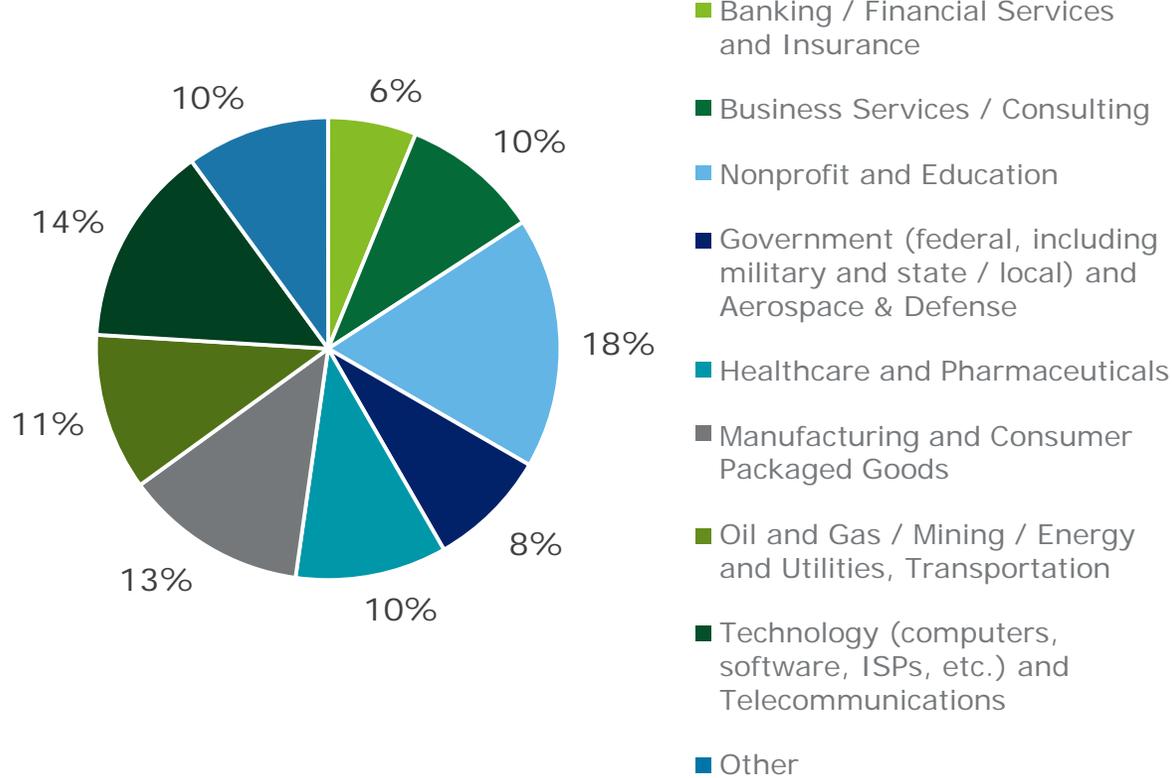
High-Impact Diversity and Inclusion Survey Demographics (cont'd)

Industry

Consolidated Industry



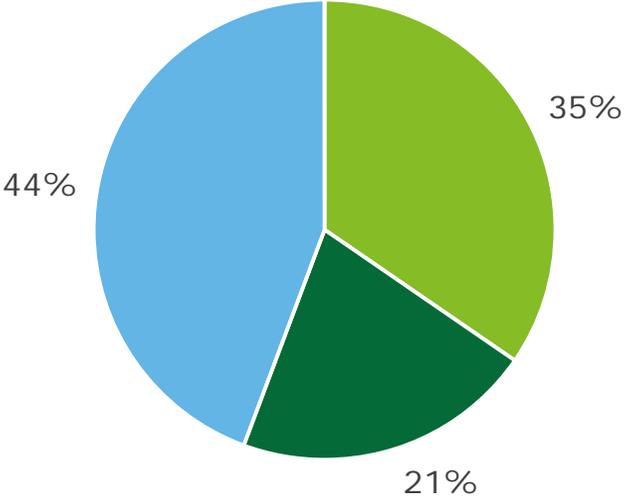
Detailed Industry



High-Impact Diversity and Inclusion Survey Demographics (cont'd)

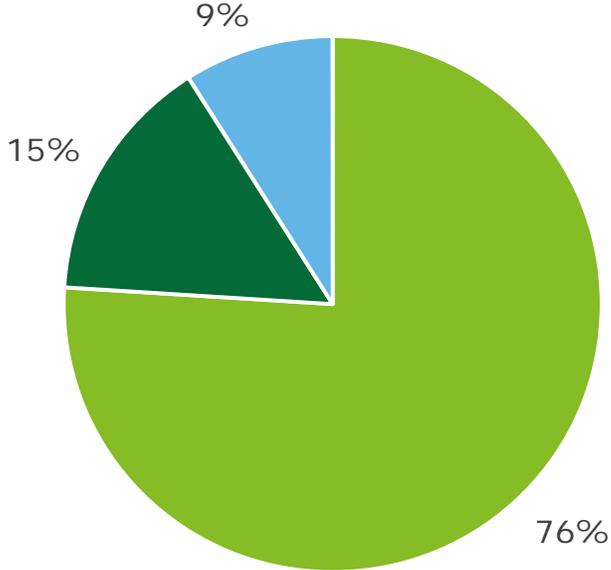
Extent of Geographic Reach and Company Headquarters Locations

Extent of Geographic Reach



- Global (high level of global integration)
- Multinational (national / regional operations act independently)
- National (operations in one country only)

Corporate Headquarters (HQs) Location

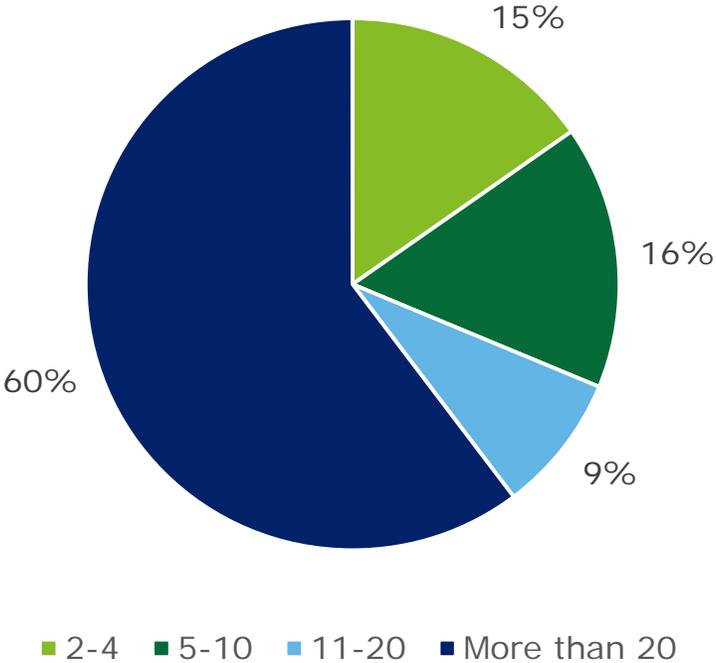


- United States HQs
- Canada HQs
- Not Reported

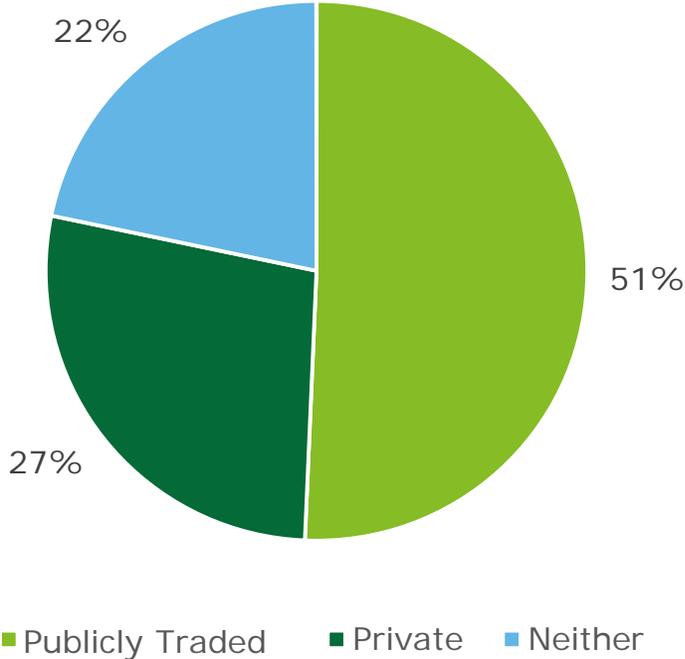
High-Impact Diversity and Inclusion Survey Demographics (cont'd)

Number of Countries in Which Company Operates and Company Ownership Status

Number of Countries of Operation



Public or Private Company



Endnotes

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