



AUTHOR:
Vessy Tasheva



How Diversity & Inclusion Leaders Can Drive Measurable Results



WHEN IN ROME, DO AS THE ROMANS. BUSINESS LEADERS WANT RESULTS. BRINGING THEM A SYSTEM FOR D&I THAT DRIVES RESULTS IS THIS WHITEPAPER'S SECRET. OKRS ARE YOUR GAME PLAN TO DRIVE RESULTS, AND ULTIMATELY, THE CHANGE YOU WANT TO SEE AS A D&I LEADER.

Table of Contents

About the Author	5
Connecting the Dots	6
Mapping the Diversity and Inclusion Landscape	7
What is the State of D&I?	7
Problems D&I Leaders Face	8
Is D&I Actually Relevant?	8
Turning D&I Initiatives into Results	9
Negative Trends. Positive D&I Corrections	10
D&I in Isolation	10
D&I Overshadowed by CSR	11
Nonexistent Gameplans	11
Lack of Resources	12
Importance vs Urgency	13
Chaos or Concentration?	14
Who's in Charge?	15
Framing Mental Health and D&I's Role in the New Era	16
Remote Work: Fad or Future?	17
Autonomy in a Digital World	17
Inclusive Leadership	18
Redefining Rituals	19
Striking While the Iron is Hot	19
Strategy and OKRs in D&I	20
Diversity and Inclusion Opportunities	21
Building the Case for Diversity and Inclusion	22
Position Attrition	22
Acronyms Everywhere: The ROI on D&I as DNA	25
Getting Ahead of the Curve: Benchmarking	26
Planting the Seeds	28
Fight Your Battles	29
OKRs for a Better Workplace	30
Why OKRs Are The Way	30
A Real-World Example of a D&I OKR	33
Setting OKRs to Seal the Deal	34
Other Considerations for OKRs in D&I	34
Conclusion	36

A Note on the term

“Diversity & Inclusion Leaders”

In this whitepaper, we refer to operators in D&I leadership as “D&I leaders.” D&I leader is an all-inclusive term for different positions in the D&I space, including:

- Someone whose sole focus is D&I, e.g. Chief Diversity Officer, Head of D&I, etc.
- Someone who is unofficially leading D&I initiatives regardless of their title/function
- Members of the D&I committee acting as D&I leaders
- All of the above or any combination of the above

About the Author



Vessy Tasheva

FOUNDER OF [VESSY.COM](https://www.veesy.com)
DIVERSITY & INCLUSION AND
MENTAL HEALTH CONSULTANCY

VESSY



Hey, I'm Vessy (pronouns: she/they).

Originally Bulgarian and based out of Ireland, I work with clients across Europe and North America such as Soundcloud, RG, Typeform and more. My [client projects](#) include global D&I strategies, state of inclusion reports, ERG programs, and educational programs.

I authored two editions of my independent international [Diversity in the Workplace Report](#) (2019 edition featuring 10 companies from 10 countries and [2020 edition](#) featuring 10 companies from 10 industries).

I was named by Hive Learning as one of 2019's most influential D&I Leaders globally and as one of the UK's most influential D&I leaders in 2020. In April 2020 I launched a video course on Inclusive Leadership on SocialTalent, an e-learning platform, where the course ranked as #2 in the Most-Watched course for the month of May.

In the last 11 years, prior to being a founder, I have worked as Chief Strategy Officer of a talent tech startup, as well as in various roles across product, marketing, and culture in companies between 4 and 800 employees.

My approach:

I focus on understanding your business and engaging your senior executives to create a holistic and 100% tailored approach to your D&I needs.

How do I do that when all companies are so different?

I have a unique mix of expertise in Diversity & Inclusion, Business, Communications, and Operations.

Through the years I have worked in startups, corporates, accelerators and VCs, across various roles ranging from marketing through product to business strategy, across various industries and geographies while working with a wide range of stakeholders –

- **Across various industries:** Tech, FMCGs, Financial services and more
- **With various stakeholders:** Founders, executive leaders, investors, employee resource groups, and more
- **Across various geographies:** Europe and North America
- **Across all D&I areas:** I work with selected subject matter experts from my partner network

If you like the guidance this whitepaper offers or want to discuss what Diversity and Inclusion initiatives might look like for your team or business, follow [this link](#) to set up a chat.

Cheers,

Connecting the Dots



Mapping the Diversity and Inclusion Landscape

Diversity and Inclusion (D&I) is an approach to promoting and incorporating diverse and inclusive practices in the workplace. Diversity relates to the depth of demographic identities within teams: age, disability, ethnicity, gender, gender identity, race, nationality, sexual orientation, and socioeconomic background, for example. Inclusion is creating a top-to-bottom structure that encourages people of all groups, whether they are traditionally well-represented or underrepresented, in equal participation.

What is the State of D&I?

Diversity and Inclusion. D&I*. Two ideas that create equally polar effects. Either scaring the leaders of organizations or inspiring them to be the benchmark for progress and change.

Who is stuck between these polar ends of the D&I spectrum? Just about everyone. In D&I, there are three major tiers of involvement:

- 1. Organizations that set the standards industry-wide — the respective Nike’s and Apple’s of D&I**
- 2. Organizations that want to improve D&I but have no blueprint**
- 3. Organizations that could care less but appoint D&I leadership because it is either:**
 - A requirement for corporate standards
 - To look good or to be portrayed better in the public eye

* This whitepaper uses the term “D&I” to address the field that covers any of these: Diversity, Inclusion, Inclusiveness, Equity, Equality, Belonging, Integration, Accessibility, etc. Any further use of “D&I” can be interpreted as a non-excluding term to highlight all of these subject matters.

Problems D&I Leaders Face

D&I leaders have a tricky responsibility: making everyone care. Working with an often untrained (or unwilling) leadership team, D&I leaders are faced with doing the most work with the least resources. Only through strategically and effectively using time and energy can leaders drive measurable impact. In a constantly evolving D&I landscape, it is difficult to ... until now.

This guide illustrates the challenges with common D&I approaches, countered with solutions. D&I leaders will be able to:

- ✓ Connect the dots between D&I initiatives and bottom-line business value
- ✓ Implement a proven methodology for change and define their role
- ✓ Execute initiatives without ambiguity and confusion

Is D&I Actually Relevant?

D&I is often cast aside because it's not viewed as practical. There is little in the way of blueprints or systems. This is the biggest challenge you as a D&I leader face. D&I isn't a formula on a spreadsheet or system to generate leads. It is abstract. Therefore, it is feared and not cared for.

Diversity and inclusion can no longer be the neglected child of organizations dedicated to profits. Organizations face declining employee mental health and increasing burnout, combined with the demand for increased diversity and inclusion. But D&I doesn't have to mean sacrifice or charity.

D&I can be an integral part of a company's DNA. If D&I is neglected, it can lead to a decrease in employee satisfaction, turnover rates, the effectiveness of output, and ultimately, P&Ls. However, increasing diversity or inclusion is not the magic solution to all of your organization's problems:

“Increasing diversity does not, by itself, increase effectiveness; what matters is how an organization harnesses diversity, and whether it's willing to reshape its power structure.”

[HARVARD BUSINESS REVIEW](#)

Turning D&I Initiatives into Results

Positioning D&I as an effective strategy can win you allies as a D&I leader. Lacking a dedicated focus and alignment for your D&I strategy can cause you to lose those allies. OKRs are a goal-setting methodology that helps D&I leaders deliver on promises and initiatives.

“When diversity initiatives promise financial gains but fail to deliver, people are likely to withdraw their support for them.”

HARVARD BUSINESS REVIEW

Whether companies like it or not, D&I is more relevant than ever. The friction point? Leaders in D&I roles understand its importance, but the organization and other leaders may not. D&I isn't the average department that can be isolated and controlled. You need to work on it every day. You need to invest in it every day.

Investment with D&I begins with self-awareness as an organization. As your organization develops awareness, you as a D&I leader can take your team through the stages of understanding, applying and embedding, then making the process of D&I sustainable.

Ask yourself, “What are we doing well? What needs to be improved? What is our biggest challenge today?” Have a stronger finger on the pulse of an organization is the mark of a great D&I leader. Whether you're starting with full support or no support in D&I, asking the right questions is your first step.

OKRs bring autonomy, transparency, and clarity into D&I initiatives. Your intent is a great first step in building positive sentiment as a D&I leader. Bringing a detailed, thought-out plan structured with an OKR framework is the method to create the D&I changes you want to see.

When in Rome, do as the Romans. Business leaders want results. Bringing them a system for D&I that drives results is this whitepaper's secret. OKRs are your gameplan to drive results, and ultimately, the change you want to see as a D&I leader.

How do D&I leaders turn strategy into results? You need a system that links an ambition, like D&I initiatives, with execution. Following a goal-setting methodology like OKRs bring Objectives, qualitative focus drivers, and Key Results, quantitative metrics to measure against, into the D&I equation. This whitepaper will give more examples of D&I in parallel with OKRs, but to learn more about OKRs as a methodology, you can read more here.



Negative Trends. Positive D&I Corrections

Creating a D&I recipe for success starts with having the right ingredients. Negative trends in D&I can ruin a great recipe. Ensuring you have a great D&I recipe means course-correcting the negative in your organization.

Each company has its unique biases. Some companies have tons of positive intent but fail to align leaders with or dedicate resources to D&I goals. Other companies need education on the purpose of D&I but have resources to dedicate to it. Contextualizing these biases to your organization as a D&I leader helps better tailor your approach — plans can't be bulletproof if they're tone-deaf.

This section will outline negative trends in D&I and what leaders can do if they are encountering them in their organization.

D&I in Isolation

PROBLEM:

D&I is viewed as a secondary objective or placed into the “other” category

SOLUTION:

Embed D&I in your business strategy and make it a priority

High-level decision makers may define D&I as a “buzzword.” Traditionally, D&I initiatives have been stuck under the HR umbrella and otherwise neglected. While some members of upper management may tune out what they consider to be another buzzword, they DO take company values or “pillars” seriously.

These belief pillars root the goals and execution of the best-run companies in the world. They're often coded as “Our Vision” or “Our Mission” statements. For example,

ThoughtWorks outlines their mission, "... by its three pillars: to run a sustainable business, to champion software excellence and revolutionize IT, and to advocate passionately for Social and Economic justice. This third pillar is a key influencer of our culture and values. It sets us apart and we had to speak up in solidarity with LGBTQ+ people."

You can see how that impacts their decisions in India in [this report](#).

Some executives may not see D&I as an obligation, but if you tie the roles of diversity and inclusion to the greater pillars of the company, you can frame D&I as integral to the company's values.

D&I leaders can show how improved diversity and greater inclusion better aligns the company with its core values. If your organization uses OKRs, you can assess high-level objectives and find how D&I initiatives can plug into key results or vital tasks.

D&I Overshadowed by CSR

PROBLEM:

CSR (Corporate Social Responsibility) can trivialize or isolate D&I efforts

SOLUTION:

Treat D&I as a separate entity from CSR, but united with all efforts

CSR is perceived as charity or non-business. Its efforts are more aligned with public relations and creating a good image through acts of service. Professional consultants advise against including D&I as part of their Social Impact or CSR teams.

Having D&I as a standalone from CSR prevents it from merged and losing its focus.

Nonexistent Gameplans

PROBLEM:

Half-committed efforts, no focus on constructive outcomes, lack of focus

SOLUTION:

Establish clarity and commitment to measure and track impact, create integration

Critical decision makers want results, not intent. Ideas are nothing without execution. Especially in organizations where you're pleading a case for D&I, having a detailed gameplan is a surefire way to raise eyebrows and gain allies. Having a plan is half the plan.

Assessing how your company's D&I standards aren't cutting it requires doing a data deep dive. How are you ensuring equal opportunity for current and future employees? Do you have any programs in place for constructive mental health practices? Saying "we need D&I" is never going to cut it.

Explaining why D&I initiatives are necessary and showing how they would work can seriously build your case. Using OKRs as a framework for D&I can help you align a results-driven gameplan with your organization's greater goals. Remember: your gameplan as a D&I leader returns to answering the questions, "Why should decision makers care?" and "How does this affect them?"

Lack of Resources

PROBLEM:

D&I is isolated as a singular effort or neglected; what isn't noticed isn't budgeted

SOLUTION:

Treat D&I as an equal department e.g. a marketing team

D&I teams aren't like other teams or initiatives. CDOs and CIOs may have budgets in the millions — with D&I, that's not the case. Underbudgeting is often the case with D&I responsibilities or makeshift "departments." D&I leaders are tasked with transforming entire organizations.

Nearly 1 in 4 CDOs claim that budgetary constraints are a top concern for them. Alignment, measuring results, garnering support already make D&I a challenging task, but lacking budgets compound that challenge.

How do you, as a D&I leader, build leverage for increasing D&I resources? Swaying opinions and gaining favor. D&I is perceived as critical for organizations, but it places last among business priorities via [a 2019 Russell Reynolds S&P analysis](#).

One person is rarely going to get total resources. Finding internal allies and increasing the scope of responsibility, and as a result total dedicated time, will put your D&I efforts on the company radar.

Simply pleading for money or volunteers and not taking action = **Driving blindfolded.**

Recruiting employees who care, showing a greater time commitment in D&I = **Blindfold removed.**

Time is money for organizations. Leverage D&I involvement as reason for increasing resources.

Importance vs Urgency

PROBLEM:

D&I is seen as important, but not urgent... until D&I becomes a crisis

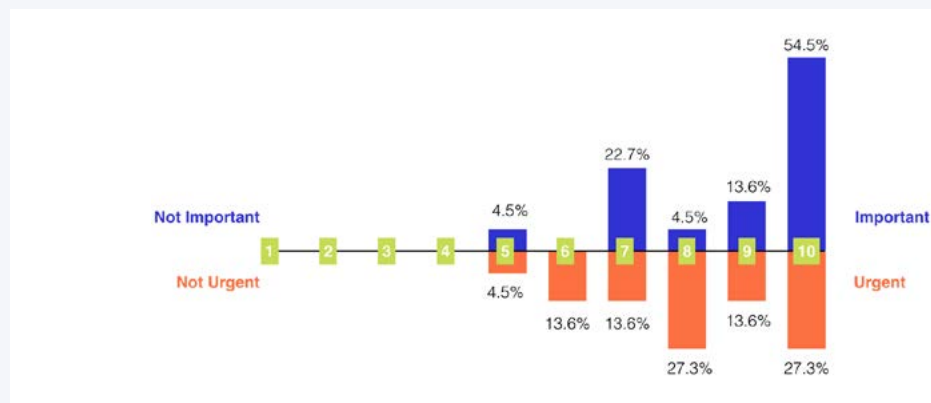
SOLUTION:

Bridge the gap between important (good intent) and urgent (taking action)

Wildfires start as a small flame. Major crises begin with small issues that compound. Unfortunately, D&I efforts generally aren't considered urgent until there is a problem or a cataclysmic event. As a D&I leader, your responsibility is to drive urgency as the vehicle of change. Control the narrative and frame D&I as constructive.

In this [Chief Diversity Officers report](#), 79% of executives believe that D&I is an important driver of company reputation. 66% believe D&I is an important driver of financial performance. The numbers show that executives are already considering the weight of D&I initiatives. It's up to the D&I leader to create the urgency through planning and structuring.

54.5% of businesses consider D&I important, while only 27.3% consider D&I urgent. Important is a thought, urgency is an action.



Source: vessy.com

D&I is like an actual vehicle at a business's disposal. If it is maintained, the vehicle functions well. Inclusion becomes a rich part of a company's culture. Employee mental health and wellness is consistent. The vehicle runs well.

But left neglected, parts break down. Rejecting diversity and inclusion is the rust on the vehicle. It tarnishes the trust of the organization from the inside, out. Once D&I is neglected for too long, it becomes a costly mistake — increasing turnover, decreasing efficiency, destroying passion.

This storytelling will only take you so far as a D&I leader, but it is important to frame this story for other C-suite leaders. Not every company that invests in D&I can avoid crisis. But for companies that do not invest in D&I on the front-end, a crisis is inevitable. Positioning D&I as a preparation tool opens the minds of leaders to initiatives that can keep your organization off the crisis path.

Chaos or Concentration?

PROBLEM:

D&I isn't a C-Suite concern; decision-makers try to delegate D&I away

SOLUTION:

Level up the involvement ceiling. Motivate the bystanders. Use OKRs to engage everyone

Numbers are the D&I leader's best friend. Similar to the "Lack of Resources" trend, finding allies is the first step in leading the D&I charge. If your instinct as a D&I leader tells you an initiative is important, it's likely that plenty of others believe the same way.

However, this shared sentiment on your team doesn't mean you will immediately have a full functioning D&I team. The Bystander Effect takes place in a business context. With the **Bystander Effect**, everyone is watching and knows that somebody should do something, but nobody is taking the lead.

Team members become bystanders to D&I initiatives because of either: 1) Fear of failure or 2) Lack of organization. Your mission as a D&I leader is to identify the bystanders in your organization with a similar care/interest. Gathering support is trial and error, but that support makes noise. That noise drives initiatives.

Support starts with vulnerability. The difficulty as a D&I leader is accepting responsibility for everything in D&I. You will be rejected. Your ideas will be questioned. At every turn, you will be asked to prove your authority to make decisions. Embracing the vulnerability others are unwilling to take on shows your strength as a leader, which will gain you allies over time.

D&I is a team effort, after all. It takes more than being a great coach as a D&I leader to have a winning team. You need players that are excited to help you achieve your objective. Being the face of D&I and accepting the burden of responsibility can take the pressure off of employees to support your efforts.

Who's in Charge?

PROBLEM:

There isn't a one-size-fits-all approach to D&I management. D&I can't be copy-pasted

SOLUTION:

Crafting your organization's tailored and holistic approach or finding a D&I leader than does

Getting started in D&I is a task that's so scary, some companies won't even do it. However, an appointed D&I leader can be a great first step for companies if they don't have one. In other cases, the D&I leader needs consulting from a professional to get started or help them level up.

Assuming responsibility is not a risk. It's an opportunity as a D&I leader or a company looking to appoint one. "I don't know, we've never done this" is no longer a reason for your organization to overlook D&I. Framing yourself as "in-charge" brings focus and alignment to D&I.

Utilizing an OKR framework can tailor your approach to D&I. Other leaders can find D&I messy. It's your job that to convince them that D&I can be structured like any other objective through the power of OKRs. It doesn't have to be messy.

OKRs start as ideas for what your company needs for D&I. As a D&I leader, this means collecting data on your organization. What does your company's definition of diversity? As a D&I leader, you can wear the hats of the people you seek to gain support from — these are the people who set OKRs. Empathize with them. Speak their language and they will reciprocate.

Beginning with OKRs in D&I is like building a house. Getting an unfiltered sense of your organization's view on D&I is laying the foundation for the D&I house. Regardless of how good or bad the D&I situation is in your organization, this truthful foundation is crucial for building a strong house for D&I. Understanding leadership and employee sentiment to D&I, analyzing any previous D&I efforts, and choosing where to focus your efforts are the walls of the D&I house.

The solution of creating a tailored approach to D&I lives and breathes with this research.

In the case of being a member on a D&I committee, you are not without hope. Professional D&I consultants can coach your teams to drive initiatives and grow internally. Whether your organization decides to appoint a D&I leader on your team, you or a team member step into a role, or an external leader is brought in, D&I success can be found on any of these paths.



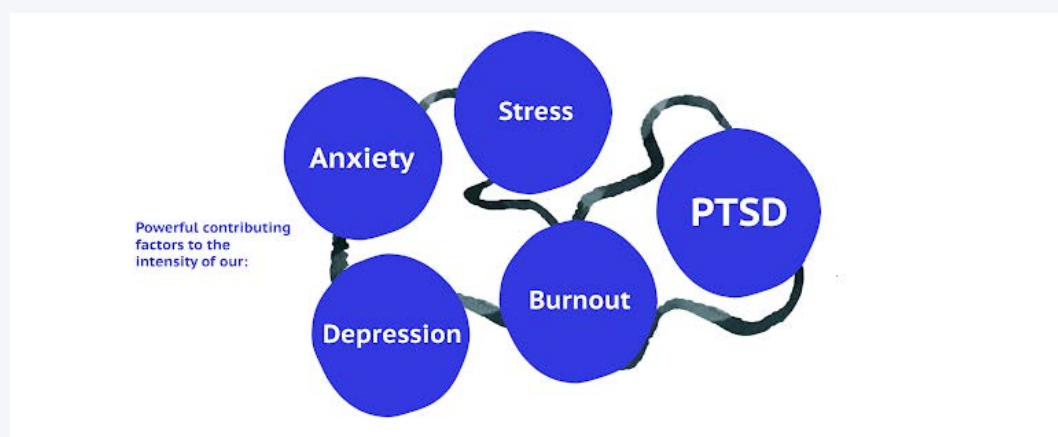
Framing Mental Health and D&I's Role in the New Era

A global pandemic primed us to prioritize D&I. *We just haven't embraced it yet.*

One major flaw in D&I is attempting everything at once. In the pursuit of doing everything, nothing is accomplished. Similar to how a failing business can't be turned around immediately, neither can struggling D&I initiatives.

Success is created by incrementally building momentum. At the peak of a global pandemic, the urgency of diversity and inclusion peaked through media headlines and social movements. In perspective to the events of recent years, D&I leaders have never been more important, helping their teams navigate the narratives of:

- Racism (#StopAsianHate, #BLM, etc.)
- Hybrid Remote / Virtual First
- Mental Health
- Political protests (e.g. #EndSARS in Nigeria)
- Human rights protests (e.g. #WyrokNaKobiety in Poland)



Source: vessy.com

Mental health emerged at the beginning of the pandemic as the **#1 concern for employees**. Positioning mental health as an inclusion effort opens the door for more selective long-term D&I initiatives. Understanding the state of mental health in the digital world gives you, the D&I leader, the scope of opportunities to push inclusion within the context of your organization.

The way businesses operate day-to-day has shifted. The question of work-life balance is on everyone's minds. People question what diversity and inclusion look like in every industry, from small businesses to Fortune 500 companies in dozens of countries. The urgency of anti-racism and the future of virtual work can be focused through the lens of mental health discussion. These "new normals" set the stage for dialogue around mental health, racism, and virtual work for employees in this new digital age.

The following sections examine what the D&I leader role looks like with the emerging realities that organizations are faced with.

Remote Work: Fad or Future?

The global pandemic threw a wrench into business operations of all sizes. The emergence of remote work challenged the traditional work mentality. Businesses had a choice: adapt with work from home accommodations, or fail. Worldwide, workers proved that most jobs can be done from offices or makeshift dining room setups.

The problem with working from home? Work doesn't leave home. This one of the biggest struggles that remote workers face, **with 21% feeling unable to unplug, and 16% experiencing extended feelings of loneliness**.

The border between bedrooms, dining areas, and other behavior-focused areas become blurred to the invasion of remote work setups. We've realized, either as employees or leaders, that tradeoffs come with the efficiency of remote work. Digital fatigue and burnout largely contribute to diminishing mental health across the board. But it does not have to be this way.

Leaders are often unaware of the mental health of their employees. The usual telltale signs of fatigue or day-to-day struggle in a physical environment are concealed or painted over by the digital filters and screens we work through. Isolation and loneliness are the core of this fatigue.

D&I leaders, together with C-level leaders, can identify ways to cultivate an inclusive environment for employees in all environments. Bringing the humanity aspect of work, like vulnerability, is part of encouragement in remote collaboration. OKRs provide an avenue for cross-collaboration and opportunities for team members to interact openly. Taking responsibility for this inclusion as a D&I leader will alleviate the burden on other leaders and better define the benefit of your role.

Autonomy in a Digital World

Zoom. Google Meet. Communication silos. Having meetings to discuss other meetings about old meetings. You don't have to be a D&I leader to understand how much time is wasted during inefficient meetings. These time drains are large contributors to

employee burnout.

D&I leaders have an opportunity to counter this.

Remote work doesn't mean leaders have **to overcommunicate**. Leaders are better off focusing on **effectively** communicating, bringing flexibility into the workplace. Abolishing the 8-hour workday, 5 days per week is too radical of a practice for most companies. However, measuring progress by hours of input in a digital working world is a recipe for terrible mental health. D&I leaders can urge teams to consider and frame effective time usage versus trying to plug away hours in the day.

D&I leaders can leverage work-life balance as an opportunity to pioneer mental health for digital employees. Leaders who push for mental health solutions hold enormous upside through unity and inclusiveness in their teams. Utilizing an OKR system can measure output versus hours, becoming the integral step in transforming the mental health narrative in the digital world.

40 minutes or 4 hours no longer matter, as long as the end result is still the same.

Knowledge workers particularly benefit from OKRs and autonomy. Promoting autonomy to accomplish a complex task — usually projects that require an arbitrary amount of time — helps reduce fatigue that often defines their role. Instilling worker autonomy builds trust.

Traditional leaders fear that giving employees the benefit of autonomy will lead to an abuse of the system and the company's time. However, if benchmarks are measured by output versus hours, the **"riding the clock"** method loses its luster. With OKRs and project-based focus, employees control their destiny because it's no longer about "company time." Trust built through this autonomy increases employee satisfaction.

Inclusive Leadership

Team members can smell inauthenticity from a mile away. Leaders who say one thing and do another lose their credibility. Mental health and inclusivity are no exception. D&I leaders who claim mental health is important are the classic example of an **echo chamber**.

Leading by example, however, is the way to break through the echoes of good intent and integrate actual results with inclusive leadership. Leaders across the board will have a blueprint to follow thanks to D&I leaders, empowering them to set the example for their own teams.

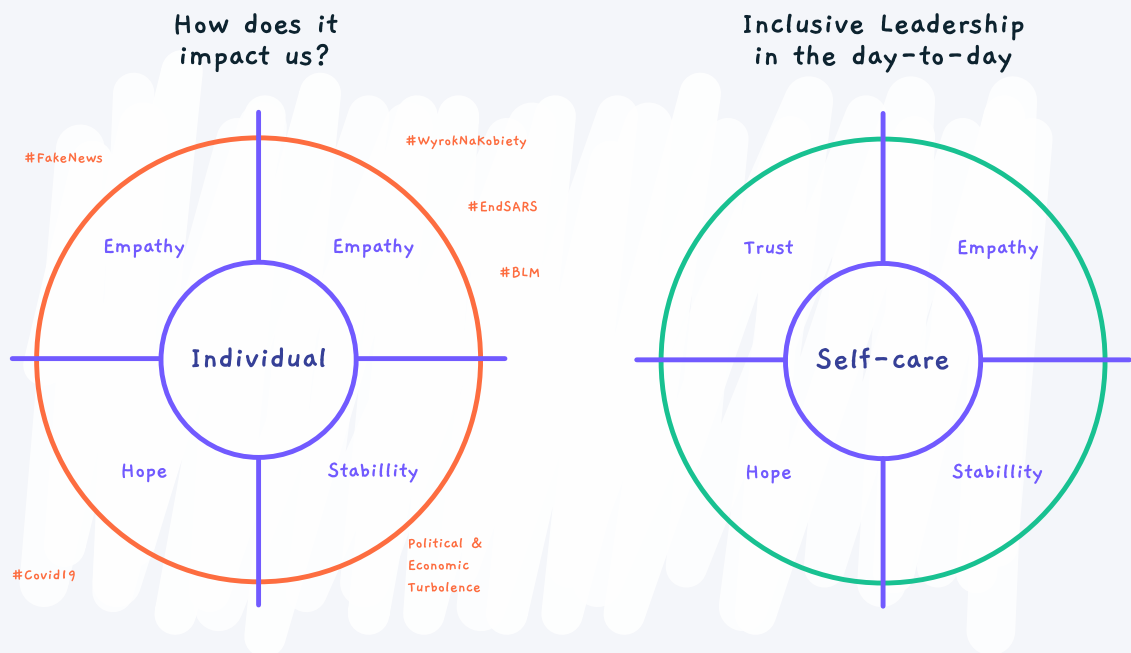
What does **inclusive leadership** look like? Openly embracing "soft" skills as a leader is a great first step. This is the IQ vs EQ argument. Is leadership about intelligence or the emotional management of yourself and others? As a D&I leader, you have the opportunity to highlight the value in both.

A few examples of practical skills that foster an inclusive environment: Promoting self-care, leading with empathy, providing a core of stability, having the ability to play and not hyperfocusing your teams on work, instilling hope and trust within teams.

Each organization is unique in its inclusivity needs. Lack of direction, not intent, is usually the friction point for teams. D&I leaders can't delegate inclusiveness and

mental health just to appear inclusive. Inclusivity is a task that can't be assigned. It's a challenge for each leader and team. As a D&I leader, the time-old adage "actions speak louder than words" rings true.

You can't be a teacher if you don't learn the material.



Source: vessy.com

Redefining Rituals

The global pandemic turned the idea of what a Ritual is on its head. People either changed their Rituals or lost them altogether due to the mass transition of digital/virtual work. An example of a Ritual now, defined by the pandemic era, is a Friday evening get-together over wine on Zoom.

While this may work for some, for others it's a Ritual replacement that comes up short. What other Rituals can we have that give us stability or allow us to restart and reconnect? Rituals are a great way to rebuild trust, recover from compassion fatigue, and find hope. D&I leaders can be the supporting force behind redefining the placeholder Rituals we've picked up since the pandemic's start.

Striking While the Iron is Hot

Timing is critical in any business venture. A global pandemic created a unique set of challenges encompassing workers in every industry. Two challenges, employee mental health and company inclusivity, are hot topics. As a D&I leader, capitalizing on this attention while it's relevant is vital.

However, you can't try to uproot everything your company is doing in the name of D&I. Balancing change and practicality is your best chance to be heard to as a D&I leader. Otherwise, you become a contributor to diversity fatigue. Employees will get tired of hearing that things need to change.

Focusing on a problem that affects everyone is your greatest chance at success as a D&I leader. Mental health lapses are a reality everyone has faced, especially in the context of a global pandemic. Teams understand the constant tension and pressure of work in this burgeoning remote era.

Feelings of security are low. Social anxiety is high. Your ability to empathize with these concerns gains allies for D&I. Mental health is the foot in the door. As a D&I leader with a plan to execute, a foot in the door can become the catalyst for transformation.

Strategy and OKRs in D&I

D&I initiatives need to be dual-purposed. The **data-driven purpose** is affecting positive change that can be shown with metrics. Examples:

Improve employee satisfaction scores and experienced level of inclusion by X points. Increasing the diversity of new hires by X%, or going a step further and promoting employees of diversity by X%. The gaps in diversity in new hires versus overall diversity and promotions is important to note.

This purpose will help you understand if your D&I initiatives are impactful through data and will align strongly with benchmarks.

These purposes are closely tied into the **key results** for OKRs. Data provides a metric to improve upon. Key results ideally challenge your team or organization, but with appropriate focus, are attainable.

The **identity purpose** involves intertwining D&I initiatives with your organization's greater purpose. This is the only way to ensure the long-term sustainability of D&I initiatives.

This purpose requires more than just improvement in numbers. You need a system that helps align your D&I strategy with the company's identity. The identity purpose is tied into the **objectives** for OKRs. Objectives are ambitious, qualitative, and focus on the outcome from the results.

D&I cannot be dual-purposed without the data and the identity, just as OKRs cannot exist without the objective and key results. The parallel between D&I and OKRs provide a strategic opportunity. OKRs are a tested and proven methodology for tracking changes in real-time, so that you as a D&I leader can adjust and adapt your execution.

You can keep playing catch up as a D&I leader, but innovators don't start initiatives to reach a benchmark then stop. Innovators implement OKRs to break through the "normal" in the landscape and **set** the benchmark.

Diversity and Inclusion Opportunities



Building the Case for Diversity and Inclusion

D&I is unique. But it is a working part of the business like any department, subject to the same scrutiny and expectations. The challenge with D&I is defining how its efforts simultaneously satisfy the needs of the business and the needs of its employees.

Dedicating time and resources to D&I for the sake of face value isn't a luxury all businesses have. In this whitepaper, elements of the business case for D&I have appeared. Bringing a business gameplan is just as vital as bringing the D&I gameplan. Below are a few pointers.

Position Attrition

What's your unique business case?

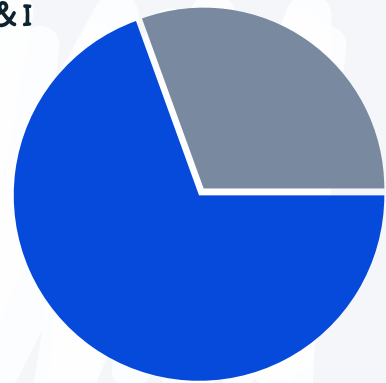
Multiply some numbers to see how much exactly (\$) it costs you



Source: vessy.com

Has your leadership team clearly defined and communicated why D&I is important to the organization?

62.2% said “YES”



Source: vessy.com

Employee turnover (attrition) is a huge drain on the time and resources of any business.

With the average turnover rate between 10–50% for my clients, the investment lost in hiring, training, and paying these turnover employees is an opportunity for D&I leaders to step in

VESSY TASHEVA

Decreasing the attrition rate begins with analyzing internal practices. Does the fault lie with the new hires coming in? Or with the teams they are joining? D&I leaders who better understand the strengths and weaknesses of their organizations can find the cause(s) of employee turnover. The **Jobs-To-Be-Done (JTBD) framework**, typically used for product research, can be used to identify talent needs and more specifically why employees choose to stay or leave a company or position.

Forces: e.g. Inclusive Leadership
 Power: How important to us?
 Direction: + or -

- Forced to live in (expensive city) when I'd rather move back to (home city) for the next year +5
- Working in silos +3

Problem with current job

CURRENT JOB

Existing habits

- I have a few good friends at work who I trust - 5
- I feel supported - 3
- Benefits that give me stability - 5

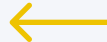


Attraction of new job

NEW JOB

Anxieties and insecurities related to change

- Inclusive Leadership +9
- Autonomy +8
- Extremely flexible remote working +8



- Close to burnout -10
- Can't meet new colleagues in person -5
- Change can make me even more anxious -6

Leave: + 5 + 3 + 9 + 8 + 8
 Stay: - 5 - 3 - 5 - 10 - 5 - 6
 Balance: 33 - 34 = -1 (stay)

POWER CHANGES OVER TIME

- Forced to live in (expensive city) when I'd rather move back to (home city) for the next year +6
- Working in silos +6
- I feel isolated and lack the environment to succeed in my job +6

Problem with current job

CURRENT JOB

Existing habits

- I have a few good friends at work who I trust - 5
- I feel supported - 1
- Benefits that give me stability - 5



Attraction of new job

NEW JOB

Anxieties and insecurities related to change

- Inclusive Leadership +9
- Autonomy +8
- Extremely flexible remote working +8

- Close to burnout -10
- Can't meet new colleagues in person -5
- Change can make me even more anxious -7

Leave: + 6 + 6 + 9 + 8 + 8 + 6
 Stay: - 5 - 1 - 5 - 10 - 5 - 7
 Balance: 43 - 33 = 10 (leave)

Source: vessy.com

Note that new factors appear over time, while the power of existing factors changes over time. A factor that was important to us can become less important or more important and sway the balance of our decisions. The weight of any factor can be the determining factor in [whether an employee stays or leaves](#).

Soft skills create a fostering environment for team members to do their best work and align their efforts. [Soft skills that new employees require](#) to feel engaged with a team, via power change examples, include but are not limited to:

- **Voice**
- **Decision making**
- **Belonging**
- **Transparency & communication**
- **Authentic commitment to D&I**
- **Allyship**
- **Professional development**
- **Hierarchy**
- **Employer branding**
- **Retention**

As a D&I leader, you have the opportunity to identify and improve the culture of your organization. D&I is more than improving soft skills, forcing teams to take training modules, or pitching a high level goal. Culture is the focal point for D&I leaders. Attrition does have negative effects on the company's bottom line. Leveraging D&I as a case against attrition can work, but it begins with how the company's culture and execution is defeating itself first.

Acronyms Everywhere: The ROI on D&I as DNA

When utilizing the soft skills of inclusion from the attrition section, D&I leaders can foster a greater commitment to the longevity of all employees. Getting new employees in the door is one thing. Giving them a reason not to leave has D&I DNA all over it. Company-vested inclusion efforts pay dividends when those investments translate to an improved work experience.

What's the ROI on D&I? **Wrong question.** Speak the language of C-level execs and understand the pain.

What's the cost of losing a trained employee? What's the average hiring cost for a new employee? How about the training and onboarding cost? Assuming you can't hire immediately, what's the cost of vacancy (and potential opportunity cost)? **These tailored questions have answers that impact your D&I case.**

Great D&I is maintaining the clock. Oiling the parts. Poor D&I is replacing the parts because they keep breaking or falling off.

D&I, particularly inclusion, improves the quality of the work experience. Some studies suggest that D&I can result in upwards of 20% greater employee retention. Every team is unique, and as a D&I leader, you can help your CEOs and/or CFOs crunch numbers around retention for your company.

Improving quality can improve the employee. The same reasons that team members can leave — e.g. work environment — can be the same reasons employees will stick with you. Educating fellow leaders and vocal team members about the different aspects of the employee experience will help you prime the inclusion aspect of D&I.

Getting Ahead of the Curve: Benchmarking

As a D&I leader, you are usually tasked with starting D&I initiatives or fixing what already exists. Leading industries in D&I change has less focus because it's not the initial challenge for most organizations. Setting the example and getting ahead of the curve is the true business opportunity. However, to get ahead with D&I, creating a blueprint for consistent D&I change is essential.

Diagnostics and data can drive change without overwhelming teams. Data-driven approaches will promote cooperation with other leaders in the organization and team members alike. Conducting surveys, interviewing, analyzing hiring practices, and evaluating internal communications are all examples of collecting data.

Measuring where your organization stands and tackling specific objectives with D&I, rather than blitzkrieging with radical policy, nurtures the narrative for change.

As prefaced, trying to do everything will likely accomplish nothing. SMART goals — Specific, Measurable, Achievable, Relevant, and Time-bound — are important in benchmarking. OKR systems embed the SMART approach with objectives company-wide. Building a framework for D&I change through OKRs shows the detail and measurables expected from upper management.

Analyze how your organization lines up in a global comparison, industry comparison, and regional comparison. Benchmarks start with self-awareness, not arbitrarily setting goals. What does the data show for D&I initiatives in these comparisons? What opportunities do you see for your organization to improve?

Most importantly, what does improving this data do? For example, hiring for diversity in a marketing department will require different changes than hiring for diversity in finance. Changes may not have the same effect collectively across an organization.

Contextualizing how D&I initiatives improve specific departments are an example of how benchmarks and data make a business case for D&I. D&I is a mix of strategic thinking, communications, and connecting dots between departments. Integrating day-to-day tasks in D&I with the big picture (company vision, strategy, objectives) requires a **unique mix of expertise**.

Table 3: Inclusion Benchmarked

Hiring manager	AVG score	Average company globally in 2020	Benchmark: Average for European B2B SaaS of approx 300 employees, 2021	Comment
DECISION MAKING				
I am included in decisions that affect my work	80000 - men 80000 - women & non-binary people 80000	80000	80000	CompanyX ranks in the middle between progressive tech
Perspectives like mine are included in decision making at CompanyX	80000 - men 80000 - women & non-binary people 80000	-	80000	

Source: vesity.com

Category	Sub-category	Inclusion	Engagement	Inclusion men	Inclusion female & non-binary
Gender	Female	80000	80000	-	-
	Other	80000	80000	-	-
	Non-binary	80000	80000	-	-
	Male	80000	80000	-	-
Sexuality	LGBTQ	80000	80000	80000	80000
	Non-LGBTQ	80000	80000	80000	80000
Age	18-24	80000	80000	-	-
	25-34	80000	80000	80000	80000
	35-44	80000	80000	80000	80000
	45-54	80000	80000	-	-
Ability	Visible disability	-	-	-	-
	Invisible disability	80000	80000	80000	80000
	Prefer not to say	80000	80000	80000	80000
	No disability	80000	80000	-	-
Ethnicity	POC	80000	80000	80000	80000
	White	80000	80000	-	-
Involved in Hiring	Hiring manager	80000	80000	80000	80000
	People team	80000	80000	80000	80000
	No	80000	80000	80000	80000
Location	San Francisco office	80000	80000	80000	80000
	Remote US	80000	80000	80000	80000
	London office	80000	80000	80000	80000
	Remote Europe	80000	80000	80000	80000

Heatmap = benchmarking employee segments against each other

Hypotheses

Through the survey. We tested 17 hypotheses for potential blockers to inclusion and to D&I awareness.

Hypotheses related to the employees

Hypothesis	Validated?	Result
20% of employees don't understand how D&I relates to the company values (select "none of the above")	YES	This is text that gives some kind of explanation about something.

Source: vessy.com

Starting with a hypothesis gives you direction for your benchmarks. As a D&I leader, you will identify the hypotheses before the diagnostics, then look at the results after the completion of the diagnostics. You can compare the scale and the factors once diagnostics are complete

For example, you might have thought X is an issue. But perhaps the data shows that maybe X is not an issue. But maybe Y is an issue that you thought impacts 20% of the employees when it actually impacts 40%. Key insights like these will come from the data, which gives you a better framework to construct OKRs with.

Planting the Seeds

D&I leaders can't do it alone. No leader can. D&I, like any lasting movement or initiative, begins at the grassroots. Finding supporters across the organization is a critical first step in your D&I pursuit. These allies help with the responsibilities of initiatives and magnify the voice of D&I internally.

You can plant the seeds top to bottom to start conversations.

PART 1:

Start on the opposite ends of the spectrum.

Talk to the decision-makers and influencers.

The middle is hard to motivate. They don't get the C-suite title. They're also not in the trenches. The middle is usually focused on task delegation. Performance defines their role, job security, career progression, and pay. The reality of these leader's positions doesn't make them bad people. D&I simply can be viewed as a conflict of interest because it may not directly benefit them.*

* Unless D&I is part of the performance evaluation in the company, e.g. it takes into account performance (typical quarterly goals), culture (embodying the values, D&I, etc.) and growth (new skills).

Start with employees, who will almost always advocate for better inclusion and improved work experience. Go to the high-level decision makers. One ally in the C-suite starts conversations you would otherwise never have. D&I is a gradual process. It takes time and consideration. You need the right ally to catalyze the consideration process for you.

If you have your finger on the pulse of your organization, you will understand who everyone looks up to among employees. Talking to these influencers, voices that represent the others, is critical for motivating the middle in the long term.

PART 2:

Get the leaders into the room

Consolidate your efforts. Strength is in the numbers only if the numbers are unified. Just as OKRs unify focus on a clear objective, you can unify leaders' focus on D&I objectives.

Convey the messages that any top-level leaders need to reciprocate. Learn and empathize with the wants and needs of lower-level employees, the people in the trenches. Find the cross-sections between these groups to align your D&I efforts.

Setting OKRs as the framework for this alignment is a crucial piece of the puzzle. Without OKRs, transparency on the D&I mission is lost. Linking together each individual's effort to measure impact and results is significantly harder without OKRs. Autonomy and trust, two critical components in D&I initiatives, are absent minus a framework like OKRs to structure them.

Presenting OKRs to your allies in D&I brings the strategy that leaders desire and the focus that employees need.

Fight Your Battles

As a D&I leader, refer back to our Roman analogy at the beginning of this whitepaper. Remember that while in Rome you should do as the Romans, Rome itself was not built in a day.

Once you have united your allies in D&I, focus on what matters. Through transparent communication and open feedback, discuss what your critical objectives are. Is diversity a severely lagging component in a particular department? Is micromanagement or lack of work-life balance hindering employee satisfaction?

Battles are won with strategized attacks. Taking small leaps is more practical and more likely to bring success than tackling a gigantic hurdle.

OKRs are ideal for this approach. Aligning your allies with one specific objective is better than each of your allies attacking a separate objective alone. The power of numbers in your efforts is found in the key results, not the objectives. Delegating key results and task execution among members ensures that each effort contributes back to a singular objective, strengthened by the work of many.

Winning small battles contributes to the end victory: improving D&I with measurable impact in your organization.



OKRs for a Better Workplace

In this guide, D&I initiatives have been framed in the blueprint of OKRs. Having a goal-setting methodology to pair with your initiatives is the best chance for success as a D&I leader.

Why OKRs Are The Way

Gaining the support of your organization requires you, as a D&I leader, to leverage an approach that helps the most people. This approach involves creating an intersectional approach to D&I. Team members top to bottom may feel the impact if the approach is crafted correctly.

Strategizing an “ideal” approach for your organization requires executing a plan that embraces the same ideas you are trying to cultivate in your organization. D&I change requires building trust and clear communication within your team. OKRs are a framework that embraces autonomy and transparency as pillars. Choosing a system without these pillars can undermine your efforts before you get started.

OKRs Build Autonomy

Autonomy is the bandage against micromanagement. Leaders that embrace an autonomous system convey a sense of trust and faith in team members. OKRs have built-in autonomy, allowing members to create key results that are contextual to their objectives. You cannot implement D&I initiatives that increase workplace autonomy without first practicing in a system that allows it.

Additionally, autonomy helps prevent communication from siloing. Well-executed OKRs are inclusive by design. Transparency is default. With OKRs, organizations are less likely to have strictly top-down communication that feels tone-deaf. Because each member is clear on 1) their objective and key results and 2) how those efforts tie into the team’s mission, leaders can communicate from a point of cooperation, not delegation.

OKRs Embrace Transparency

Transparency is the great uniter of focus for teams. In a well-executed OKR process, objectives and key results are transparent, helping ensure the organization (or D&I team) is on the same page. D&I is an all-hands-on-deck effort and requires nothing less than the full investment of each member.

When teams understand how their contributions bring value, they're more likely to invest. Transparency increases intimacy with individual key results and increases clarity on how individual efforts are significant to the group impact. In D&I, this helps prevent diversity fatigue and the "It seems like I'm the only one trying" feeling.

OKRs Drive Impact

When people work out, they want to see results. Results drive motivation. Motivation drives more effort. OKRs are the scale and measurements for your organization. Teams that do not track the work and efforts of their members can't benchmark properly. Without proper benchmarks, there are no results to show.

C-level execs need to see results with D&I. These leaders can't measure what matters if there's nothing to measure. Mapping OKRs for D&I backs up your efforts with data and results. Referring back to the JTBD framework, results (outcomes) are the outward point that teams aim for. OKRs bring impact because everyone top-to-bottom understands how their efforts affect outcomes.

OKRs provide the hard data that D&I needs. Through key results, improvement can be shown with quantitative data. These key results feed into the qualitative objective. The alignment that OKRs bring between quantitative and qualitative improvements drives impact for your team.

OKRs Keep Teams Accountable

Ongoing accountability as a result of OKRs trumps micromanagement.

Employees hate feeling like children in a classroom when working with their leaders. Micromanagement is an ineffective use of a leader's time. OKRs double as a management style and a results system. If you are a D&I leader with little support, you need a system that makes your job easier.

The alternative to ongoing accountability is policing or micromanaging others, which isn't constructive for leaders. As a D&I leader, it's hypocrisy. Teams don't want to be micromanaged into change. OKRs allow members to piece together how their roles relate to the greater D&I purpose. The ongoing results tracking keeps teams focused on output without the pressure of micromanagement.

Paired with transparency, teams keep each other accountable because one person's OKRs are often intertwined with another's. The standard of accountability brought by OKRs helps drive true results as a **network**, not a top-down exchange.

See how mission, products, and D&I educations correlate for RG

RG'S MISSION:

Let's make the world a better place to work

RG'S PRODUCTS:

Employee Engagement Platform

How is D&I relevant to RG's products?



Source: vessy.com

A Real-World Example of a D&I OKR

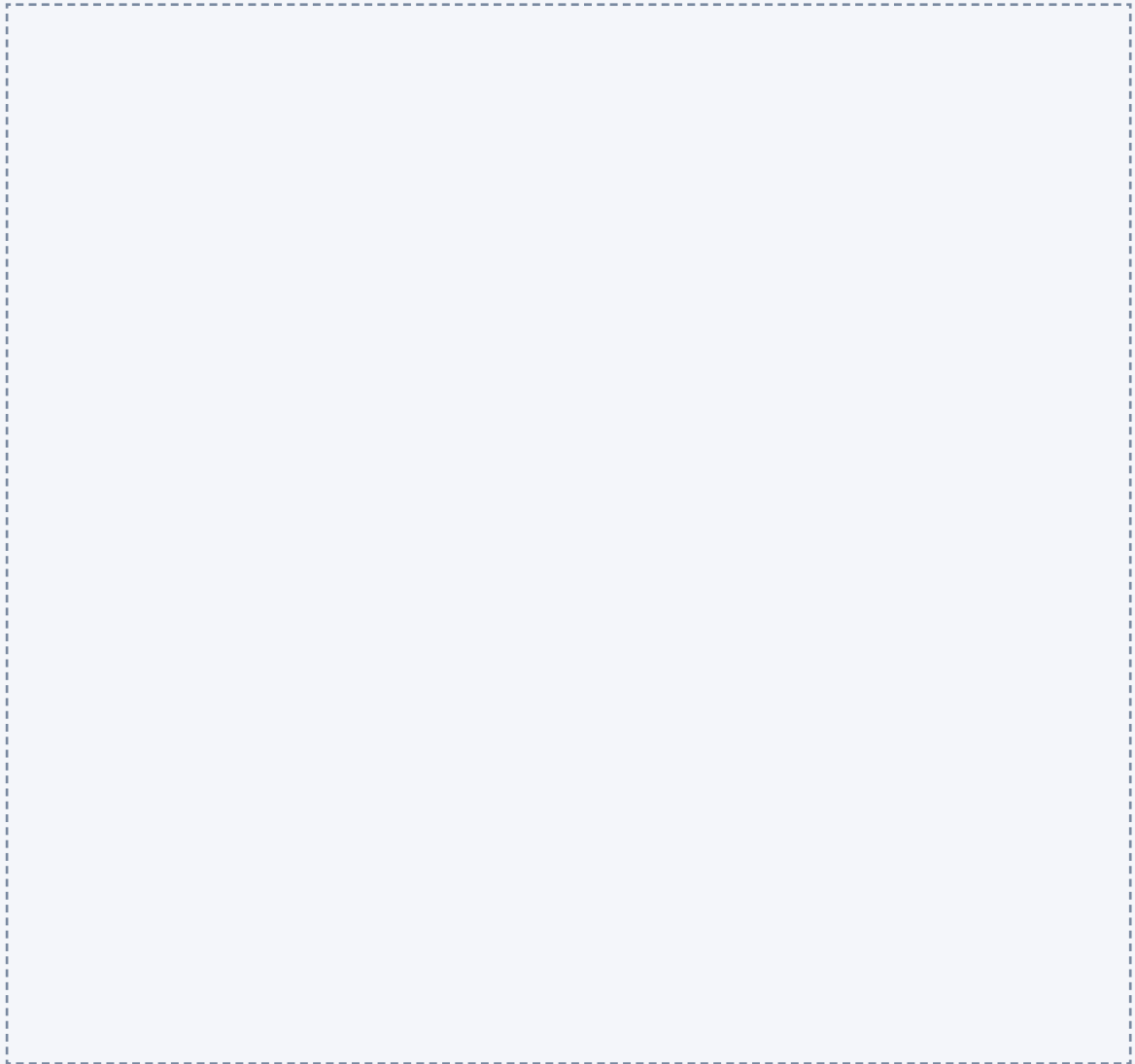


TABLE OF CONTENTS

1. Executive Summary
 - a. Introduction
 - b. Highlights on Inclusion
 - c. D&T Strategy at a Glance
2. Inclusion & Engagement - Heatmap
3. Inclusion & Engagement - Benchmarked
4. Perception of Inclusion
5. Hypotheses
6. Detailed: Blockers to Inclusion
7. D&I Strategy Proposal for 2021
8. Appendix

State of Inclusion Survey Example, source: vessy.com

Setting OKRs to Seal the Deal

D&I efforts that are specific and intertwined with a greater organizational purpose have a greater chance of success. The **Building the Case for D&I** section highlighted the importance of determining some must-win battles and projects. Breaking down these battles into workstreams is the only way OKRs can be used to seal the deal for D&I.

Generating OKRs from scratch takes trial and error. As a D&I leader, you can collaborate with and receive feedback from your team when dialing in OKRs. This whitepaper established mental health as a guiding objective because it is relevant in a general context but can be made specific to any organization.

The 6x6x6 OKR Format

The 6 weeks, 6 months, 6 years [timeline](#) is great for organizations and leaders that are new to OKRs. A cadence is important for alignment in your organization. Narrowly focusing on any single timeframe will leave your team unprepared and incapable of making long-term progress.

Focus only on 6 years ahead and execution will be impossible to define. Focus only 6 weeks ahead and your team's efforts will never compound due to a lack of vision. This framework hits the sweet spot for teams to balance urgency with execution.

6 weeks creates a timeline for urgency, but not panic. Biweekly or monthly can feel like a rush for any objective. Three months can be hard to frame on a week-to-week basis. With 6 weeks, you can set up an OKR cadence but not feel like the overall objective is a long-distance goal.

6 months is more significant than a quarter. Quarterly objectives have a tendency to backload urgency into the last month — quotas, benchmarks, etc. 6 months helps teams feel like they're consistently pushing for a significant long-term change, reducing the backload tendency.

6 years is the end goal. The grand vision. It's where you want your company to be in D&I. Any sooner, and the changes you are pushing for likely won't be sustainable or you will sacrifice internal satisfaction.

As a D&I leader, the questions “Where are we today? Where do we want to be in 6 weeks, 6 months, and 6 years?” serve as a baseline. Timelines are crucial for OKRs and structuring the change you want to see in your organization.

Other Considerations for OKRs in D&I

There are numerous intersections of D&I in any organization. In the context of inclusion, this whitepaper has illustrated the depth that mental health may be considered, but it is only one of many elements of inclusion. Diversity is an element with an ever-changing definition.

The primary consideration is defining what D&I is to the organization. This involves communication with all of the leaders. Collecting primary data through interviews, surveys, essays, etc. For the sake of context, let's look at diversity.

Define what diversity means to your organization. This is important because it takes this assessment of awareness to create the objective for diversity.

This data points to how much (or little) diversity the organization has.

Race, gender identity, sex, ethnicity, nationality, religion, disability, veteran, socioeconomic background, etc.

These overlap of these identities (intersectionality) can show the depth (or shallowness) of diversity in your organization.

Define which areas are lacking.

What needs focus?

What are we doing well and can replicate?

Where would our organization most benefit from emphasizing greater initiatives for diversity?

These are a few of the many questions you can ask.

Determine who the beneficiaries are.

D&I involves dedicating time and other resources.

Tracking where those resources go and who directly benefits is an important component.

Are we looking at racial minorities? Cross-sections like LGBTQ+ youth? Single caregivers?

Primary data collected can point you in the right direction

Consultants are also an option for additional transparency. People are more open to talk to a third party rather than someone in their company. Underlying skepticism or distrust to the company leadership, including the D&I leader, could skew the data and undermine the insights

Finding an individual approach is contextual to the organization. Your organization will need improvement in different areas than your competitors or businesses in other industries. Crafting your own blueprint for D&I requires foundational self-assessment. From there, OKRs can be constructed with greater precision than arbitrarily shooting for benchmarks.

Conclusion

The Diversity and Inclusion landscape is an ever-changing one, but D&I leaders are in a prime position to change the conversation or the better in their organization. The “if we should do D&I” question is no longer the obstacle for teams. D&I leaders can define what to do on their teams and how they can make it happen.

Establishing D&I as its own effort, not to be isolated or meshed with others, is an important task for D&I leaders. Integrating D&I into a company’s DNA will help improve the odds for success. There is no picking or choosing anymore for organizations. Leaders have to determine what successful D&I integration looks like for their teams. With D&I’s highly contextual nature, D&I leaders have an obligation to do their due diligence in understanding their organization’s unique pain points.

Creating urgency, finding supporters, and educating teams as a D&I leader are imperative for success. As we transition into a hybrid working world post-pandemic, the questions of mental health, work-life balance, and inclusiveness aren’t going away. D&I leaders have the opportunity to control these narratives for their teams before the narratives control their teams.

Structuring D&I with OKRs is ideal for simultaneously building the business case for D&I and illustrating to C-level leaders how D&I initiatives can be executed practically. In building the case for D&I, leaders can position D&I as the counter to a business’s self-defeating practices. By collecting data on the unique weak points of your organization, there are D&I solutions to reposition these vulnerabilities as strengths.

Taking on the role as a D&I leader means strategically directing your energy and always aligning your efforts with the company’s greater goals. “Why?” is an integral question as a D&I leader. Why does your organization **really** need D&I? Why are the initiatives you want to implement going to benefit the team? Why do company dollars need to go to your efforts instead of somewhere else?

Learning how to answer “why?” will prepare you for your next steps as a D&I leader. This whitepaper has shown you at a minimum that the D&I role is unique and perplexing, one that you as the D&I leader must define. In a landscape with no blueprint or universal “right way” of doing things, utilize this whitepaper as a guide, reference, and teaching material.

This whitepaper is neither completely diverse nor all-inclusive. In the realm of Diversity and Inclusion, we do hope that it serves you, the D&I leader, as a foundation on which to further educate yourself. Apply what is critical. Try what is suggested. Experiment and adapt as needed. As D&I is always changing, so are the leadership roles and the guides that follow it.

D&I is ever-changing. Engaging with professionals who live and breathe D&I every day can help you succeed with your current D&I needs, e.g. your D&I diagnostics, strategy, educational program, ERG program, or other. Vessy Tasheva, founder of vessy.com, inspires, engages, empowers, and helps leaders and employees strategize and succeed in creating and sustaining a healthier, inclusive, and purpose-driven culture, where teams and individuals get to do their best work in times of growth or crisis.

[Chat with Vessy](#)

For an OKR system that brings more transparency and focus in the intimidating world of D&I, Gtmhub is the most flexible Results Management System for mission-driven organizations. OKRs through Gtmhub provide clarity of strategy and levels up execution across teams, functions, and business units.

Try now

