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CORPORATE RESEARCH FORUM

CREATING AN ***INCLUSIVE*** **CULTURE**

CREATING AN INCLUSIVE CULTURE

Gillian Pillans and Dr. Wanda Wallace


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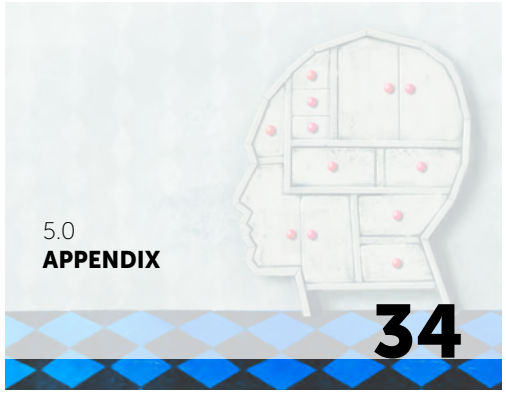
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ABOUT CRF

Founded in 1994, Corporate Research Forum (CRF) is a membership organisation whose purpose is to increase the effectiveness of the HR function, in order to drive sustained organisational performance, by developing the capability of HR professionals. Through more than 30 years of research and the expertise of our team, we have developed a deep understanding of the ways HR can contribute to business outcomes – what works, what doesn't and in what circumstances. With a network of over 275 leading organisations, we continue to grow as the respected focal point and knowledge source for improving corporate and individual performance.

We support our members in enhancing their personal capabilities and building organisational effectiveness, guiding them through topics relevant to success, identifying actionable insights and practical recommendations and facilitating networking opportunities. Our work helps organisations and the HR function make sense of the environment in which they operate, and develop capacity to deal with continuous uncertainty.

For more details on how your organisation can benefit from CRF membership please contact Richard Hargreaves, Managing Director, at richard@crforum.co.uk. Alternatively, please visit our website at www.crforum.co.uk.

ABOUT THE AUTHORS

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DR. WANDA WALLACE is Managing Partner of Leadership Forum, who help leaders and teams improve the quality of their conversations in every aspect of organisational life from team debate to inclusivity, career goals, feedback cultures and strategic insight. Better conversations result in better relationships which lead to better performance. Wanda speaks, coaches, conducts seminars and works with top teams in global corporations around the world. She is passionate about helping leaders recognise the choices they have, see the consequences, take control of their careers and build more inclusive teams.

CREATING AN INCLUSIVE CULTURE

KEY TAKEAWAYS

01 An inclusive culture is one where individuals from different backgrounds, characteristics and perspectives can work effectively together and perform at their best. In such cultures, people feel valued, respected and heard.

02 The benefits of inclusion can include increased innovation, customer connection and talent attraction and retention as well as better organisational outcomes such as financial performance. Benefits can be elusive and come with downsides, including increased interpersonal conflict and implementation challenges.

03 Diversity and representation – defined to include diversity of thought, background and experience – are important. However, it's only a starting point and needs to be paired with an inclusive culture to leverage the value of differences.

04 Culture is experienced locally. While culture may be designed centrally, it is felt at the level of small groups. At this scale, leaders can connect with individuals, see what's working and where improvements are needed and influence the day-to-day experience of culture in a tangible way.

05 Creating an inclusive culture is a responsibility that is shared among the leadership team, managers, individuals and HR. Leaders set the tone for inclusion in the organisation: effective leaders champion efforts and hold people accountable for actions. Managers create the climate for inclusion on the ground through how they manage people, run meetings and make decisions. Individuals have a responsibility to cultivate awareness of their own biases and speak up when they experience non-inclusive behaviours. HR plays a pivotal role in creating an inclusive culture through diagnosis and action planning, design of people processes and embedding inclusion in the people strategy.

06 How decisions are made influences whether people feel included. Humans are inherently biased. However, decision making processes can be structured to mitigate biases and improve outcomes. For example, widening the range of voices involved in a decision can increase objectivity and inclusion-friendly defaults can change perceptions.

07 HR processes can be designed in ways that promote inclusion. Our experience shows that most effort tends to go into recruitment – making sure new hires are representative of wider society. While this is important work, it's also necessary to consider how all the major touch points in the employee lifecycle are experienced by employees from different backgrounds. Making sure underrepresented groups have fair access to critical job assignments, sponsorship and development programmes is equally important.

RECOMMENDATIONS

01 Make sure your definition of inclusive culture is rooted in your business strategy. Be intentional in designing your culture – inclusion is not a one-size-fits-all and needs to flex depending on context and purpose.

02 Culture can be labelled in many ways – such as learning, feedback-rich, curious or inclusive – but the underlying principle is the same. Use whatever language resonates within your organisation and among leaders in your context.
Be explicit about what behaviours are expected so your culture becomes more than a statement of ambition.

03 Use **CRF's Tapestry for Creating an Inclusive Culture** as a practical tool to help you audit your current state, define accountabilities and prioritise next actions.

04 Start with diagnosis: build a clear, data-informed picture of where the issues are to help you work out what actions are most likely to be effective and how to measure progress against goals.

05 Work through key touch points in the employee lifecycle such as how you recruit, develop and reward people. Where do our data tell us that underrepresented groups experience the greatest difficulties? Which working practices have the greatest impact on how people feel about working here?

06 Remember that individual actions matter. Whether you're a manager, senior leader or team member, pay attention to who has informal access – the unstructured, unscheduled moments where trust, influence and understanding are built. Self-awareness is key.

CRF's **Diversity, Inclusivity and Wellbeing Digital Community** enables practitioners to share and learn with peers through regular online events and a WhatsApp group. Join **here**.

1.0 INTRODUCTION

For many years, DEI (Diversity, Equity and Inclusion) has been a key priority for CEOs and CHROs alike. However, recently we have witnessed a backlash in some parts of the world, most notably since the election of President Trump in the US. This has led some organisations that were previously prominent supporters of DEI, such as Accenture and Ford Motor Company, to pull back from their programmes.

Amid the backlash, we find many companies still care about this topic and are continuing their efforts to make their workforces more representative of society at large and create an inclusive environment that both delivers high performance and enables people to feel they belong. Some are using the turbulent environment for diversity programmes as an opportunity to reframe, focusing on topics such as fairness, belonging or creating an inclusive culture.

This report explores what inclusivity means in today's context and what we have learned over decades of research and practice about what works and in what circumstances. It sets out our research and provides a summary of discussions at the CRF event, Creating an Inclusive Culture, held in London on 10 June 2025.

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> *"It is essential that we focus on inclusivity and the value it brings our business, just as much as diversity. The valuable impact and broader range of expertise that comes from different perspectives is only likely to be fully realised when individuals feel accepted enough to contribute wholeheartedly without fear of censure or rejection."*
>
> **ALASTAIR PROCTER,** CHIEF PEOPLE OFFICER, MEDIABRANDS

1.1 DEFINITIONS

CRF defines 'an inclusive culture' as one where individuals from different backgrounds, characteristics and perspectives can work effectively together and perform at their best. In such cultures, people feel valued, respected and heard.

Inclusion and diversity are often used interchangeably, but they are not the same. Whilst diversity is about increasing the participation of underrepresented groups so the workforce reflects the makeup of society, inclusion is about how people experience work and is shaped by everyday interactions, behaviours and organisational culture. It's possible to have a diverse workforce without being inclusive.

Diversity itself is more widely drawn these days than when CRF first researched *Diversity and Business Performance* in 2011. Diversity includes not only visible differences such as gender, ethnicity and disability, but also increasingly socioeconomic background and neurodiversity, among others. Many organisations consider the value to come from harnessing a wide range of experiences and ways of thinking.

Inclusive culture is closely linked to psychological safety, a term which has gained prominence in recent years. Prof. Amy Edmondson of Harvard University defines it as: *"a shared belief held by members of a team that the team is safe for interpersonal risk-taking."* A psychologically safe environment is one in which team members value each others' contributions, have input on how the team carries out its work, feel able to speak up when they have ideas and concerns and do not fear being penalised if they ask for help or admit to a mistake. A systematic review by Newman et al. (2017) found that psychological safety was associated with enhanced team learning and performance, increased innovation and creative problem-solving and improved error reporting and learning from mistakes. As we discuss in chapter 2, managers play a key role in creating psychological safety in their teams.

1.2 WHY FOCUS ON CREATING AN INCLUSIVE CULTURE?

Many studies have sought to establish a link between diversity and improved organisation performance. One of the best known is McKinsey's research on the impact of gender diversity on boards. Its 2023 study of over 1,200 global companies found that organisations in the top quartile for executive gender diversity were 39% more likely to outperform on profitability than those in the bottom quartile. However, some studies (e.g. Green & Hand, 2024) have called its findings into question. It is also important to note that while diversity metrics may be associated with performance gains, these relationships are not necessarily causal – does diversity drive performance or are higher-performing organisations naturally more diverse?

Much of the available research suggests that the potential benefits of diversity come at a cost. For example, research by the late Katharine Phillips found that, while diverse teams can make more accurate decisions, this can come at the cost of increased interpersonal conflict. Her work also found that creating an inclusive culture where diverse perspectives are valued and integrated into decision making processes helps overcome these challenges.

FIGURE 1

Why focus on creating an inclusive culture?

Several meta-analyses support the proposition that inclusion can help to leverage the opportunities or advantages a diverse workforce offers. Li (2022) found that inclusive leadership is positively correlated with employee outcomes including task performance, willingness to express ideas and concerns, innovative behaviour, organisational citizenship (employees' willingness to go beyond their formal job responsibilities) and reduced intention to leave the organisation. Okatta et al.'s 2024 meta-analysis found positive effects in terms of increased innovation, improved decision-making, enhanced employee engagement and satisfaction, higher productivity and improved financial outcomes. However, these studies also highlight potential downsides in terms of increased interpersonal conflict, the risk of tokenism and complexity of implementation as establishing an inclusive culture requires significant effort, resources and leadership commitment.

Edmans et al. (2023) measured the impact of DEI, measured by employee responses to questions related to fairness, respect and inclusivity in the workplace. They found that observable demographic characteristics such as gender or ethnicity had low correlation with financial performance outcomes. However, firms with higher inclusivity scores had higher financial performance metrics, greater innovation output and higher valuation ratios.

A 2020 study by Ely & Thomas analysed data from 800 retail bank branches in the US. Researchers coded the racial diversity of each team and, by focusing on retail branches, were able to access absolute performance measures, providing a rare opportunity to assess diversity's impact using concrete data. The study found that racial diversity improved team performance only when paired with a strong learning environment – one defined by psychological safety, openness and a willingness to learn from one another. In other words, an inclusive culture was essential. The implication was clear: diversity alone isn't enough and organisations must actively create inclusive environments where differences are valued and harnessed to drive better outcomes.

There is growing recognition that inclusive cultures can drive better organisational outcomes. The London School of Economics' (LSE) Inclusion Initiative, analysing over 3.2 million employee reviews on GlassDoor, found that companies with stronger DEI cultures were more innovative and performed better over the long term, although this effect did not extend to short-term financial performance (Almeida et al., 2024).

Other potential business benefits of investing in inclusive culture include:

- **Increased innovation.** Inclusion creates an environment where diverse perspectives can be voiced and valued, fuelling creativity and innovation. One study by Brimhall and Mor Barak (2018) found that employee perceptions of inclusion were positively linked to a climate of innovation. This is closely tied to psychological safety as defined above.
- **Improved customer connection.** An inclusive culture can help organisations understand and connect with a more diverse customer base, potentially enhancing, customer satisfaction and brand loyalty. In contrast, some organisations, for example US retailer Target, have experienced a customer backlash against their decision to withdraw from DEI programmes.
- **Talent attraction and retention.** Inclusion plays a role in attracting and retaining top talent. Bain & Company (2022) report that employees who feel excluded are up to six times more likely to look for a new job, while those who feel fully included are more likely to recommend their employer to others. Inclusion is something that young talent in particular expects when they choose who to work for. EY (2023) found that 63% of employees across all generations say DE&I is important when choosing an employer – a figure that rises to 73% among Gen Z and 68% among Millennials.

In summary, although the research base on the benefits of creating an inclusive culture is growing, the empirical evidence specifically linking inclusion to organisational performance remains limited. Much of the existing research relies on employee self-reporting or inferred perceptions of inclusion, often bundled with broader diversity and equity indicators. A 2024 review by the LSE concluded that inclusion remains *"elusive to quantify and discern,"* with many companies still lacking formal definitions, consistent goals or meaningful measurement practices. Similarly, the UK Financial Conduct Authority (2022) found that while many UK firms express support for DEI, few have implemented structured inclusion initiatives, and even fewer track their effectiveness.

Nevertheless, inclusion is still 'widely regarded as a necessary characteristic of an organisation for enhancing organisational performance' (Almedia et al., 2024). Importantly, exclusion (i.e. a lack of inclusion) has serious psychological and organisational costs and is associated with stress, burnout and poor health outcomes (Shore et al., 2018).

1.3
CURRENT STATE – ARE WE MAKING ENOUGH PROGRESS?

INCREASING **REPRESENTATION**

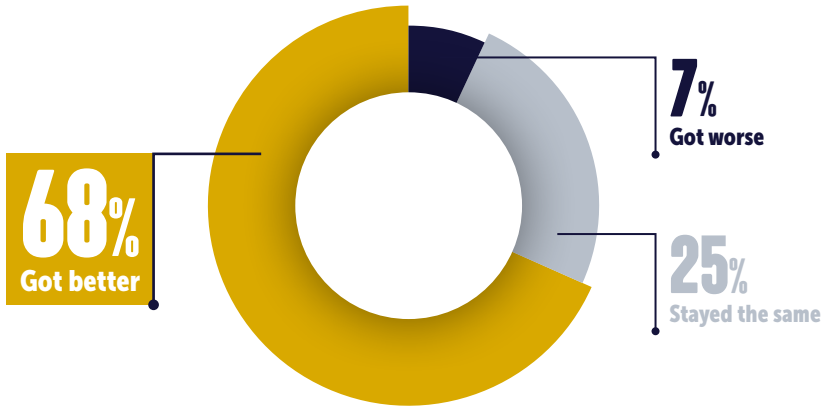
Over the past few years inclusion has moved higher up the corporate agenda. Various factors have contributed to this change, including the Davies and Hampton-Alexander reviews in the UK and public movements such as Black Lives Matter. According to the World Economic Forum (2023), leaders around the world increasingly recognise the importance of DEI and the need to act.

This growing focus has brought progress in some areas, particularly representation. By 2024, 96% of corporate boards globally included at least one woman, up from 85% in 2018. In the UK, 40% of FTSE 100 board seats are now held by women, meeting the target set by the FTSE Women Leaders Review. Ethnic diversity on boards has also improved, supported by efforts like the Parker Review. Legal and regulatory changes, such as the EU's 2022 directive on board gender targets and the UK FCA's ethnicity reporting rules, have played a significant role in driving change.

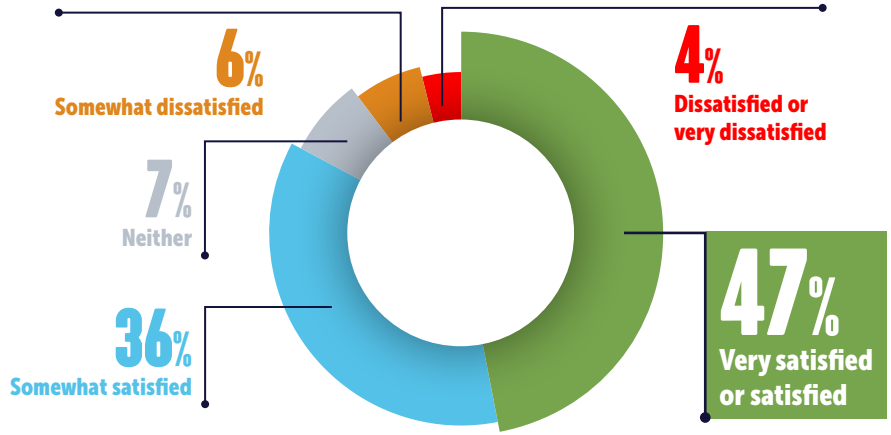
This recent progress is reflected in CRF's survey of over 150 senior HR professionals; over two-thirds said their organisation had made progress towards creating an inclusive culture over the last five years, and over 80% were at least 'somewhat' satisfied with the efforts their organisation is making to create an inclusive culture. However, there is room for improvement as only 47% were 'satisfied' or 'very satisfied' with their progress.

FIGURES 2 AND 3

Rate the progress your organisation has made in the last 5 years in creating an inclusive culture



How satisfied are you with the efforts your organisation is making to create an inclusive culture?



Source: CRF Member Survey: Creating an Inclusive Culture, 2025

55% of CRF survey respondents expect to **increase their DEI efforts** at least a little in the next two years

A **DEI** ROLLBACK?

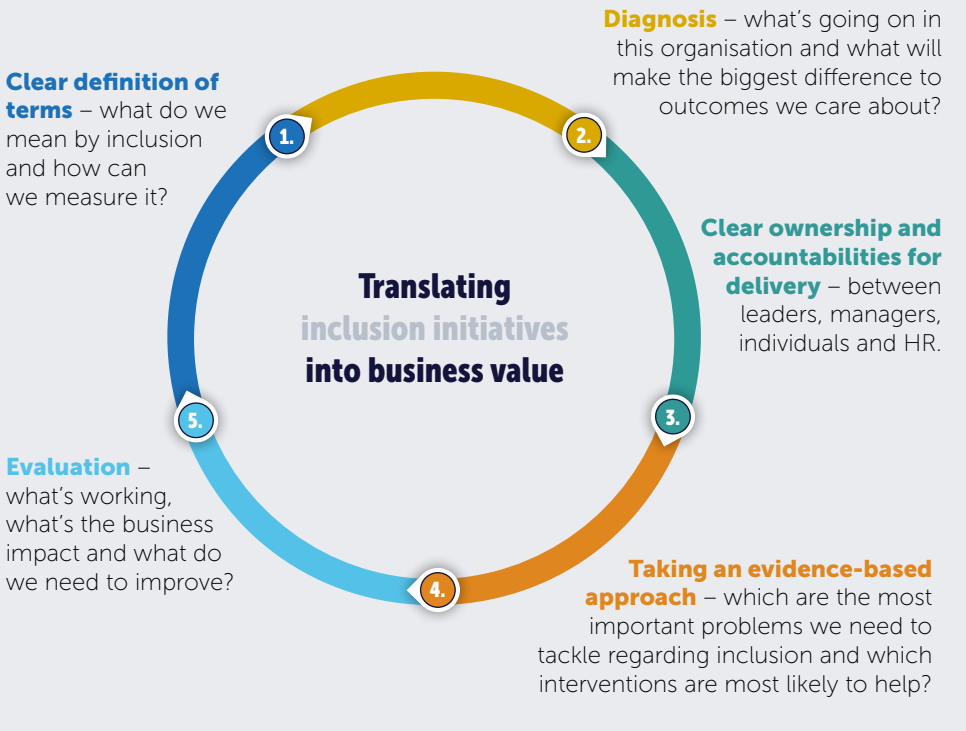
In the US, recent political and legal developments have prompted some organisations to scale back DEI efforts. However, this retrenchment does not currently appear to be spreading to Europe or the UK. A 2025 Institute of Directors survey found that 71% of UK business leaders do not plan to change their DEI approach in response to events in the US. Only 11% expected to scale back efforts. Similarly, 85% of CRF respondents expected their inclusion efforts to stay the same or increase over the next two years, with only 4% discontinuing all efforts and 11% discontinuing some efforts. However, organisations are increasingly reframing their DEI efforts to focus on concepts like 'belonging' and the shared human experience. Our survey found that many organisations are shifting their focus away from diversity towards inclusion or are being more cautious about what they report externally.

INCLUSION STILL LAGS

Many organisations still struggle to translate diverse hiring and inclusive culture initiatives into inclusive day-to-day experiences. In Bain's 2022 global study of 10,000 employees, no more than 35% in any demographic group reported feeling fully included – and this figure was broadly consistent across groups. This persistent 'inclusion gap' suggests that improving representation alone isn't enough. Challenges that organisations face in creating an inclusive culture include:

- **Practical barriers.** A 2024 UK government report found that employers want to 'do the right thing' but cited lack of available resources and lack of time to test new ideas as major barriers. Some leaders also admitted to lacking confidence, fearing they might 'say or do the wrong thing.'
- **Lack of evidence-based practice.** A UK government-commissioned Inclusion Panel concluded that many inclusion efforts are *"driven by pre-existing notions and reactive pressures"* rather than robust data. The desire to avoid negative PR (rather than focusing on 'what works') was found to often drive actions.
- **Poor data collection.** The CIPD's Inclusion at Work (2022) report found that only 38% of UK employers collect equal opportunities data, and just 25% consult data before launching new DEI initiatives. One in four say their approach is mostly reactive, often spurred by external events (e.g. the Black Lives Matter movement) rather than internal analysis.
- **Divergent definitions and expectations.** There is no single, shared understanding of what inclusion looks or feels like. According to Bain & Company, while most employees see inclusion as a key factor in choosing an employer, their personal definitions vary widely. These deeply held beliefs can clash – for example, between those who favour equity-based approaches and those who prioritise meritocracy or *"treating everyone the same."* As a result, inclusion efforts can feel inconsistent or even unfair.

Reflecting the challenges organisations face in translating inclusion initiatives into business value, we would encourage readers to adopt the following principles set out in this report:



2.0 ROLES AND RESPONSIBILITIES FOR CREATING AN INCLUSIVE CULTURE

In this chapter we explore the impact that different key stakeholders – the leadership team, managers, individuals and HR – have on inclusion. We examine their roles and responsibilities and how they can make the biggest difference to outcomes

> *"As a leader, you are a guardian of the system. This agenda needs to be seen to be held by the whole leadership team and particularly those leaders who have the biggest commercial and operational responsibilities."*
>
> CHIEF PEOPLE OFFICER, CONSUMER BUSINESS

2.1 LEADERSHIP TEAM

The CEO and top leadership team have a significant impact on the culture of inclusion within the organisation. They set the tone for the organisation; their actions determine what others pay attention to and how seriously they take inclusion.

Our research highlights the following implications for senior leaders:

- Inclusive organisations tend to have CEOs and other top executives who visibly **champion efforts to drive an inclusive culture.** This is not just about saying the right thing. It is also about acting when people behave in ways that undermine inclusion.
- It's important the CEO and executive team **take accountability** – not just delegate responsibility to the CHRO or DEI lead.
- They establish expectations and **hold people accountable for actions** they take to foster inclusion. This means setting goals and targets where necessary and regularly reviewing metrics, tracking progress and following up when things are off track. Cox and Lancefield (2021) suggest giving each functional or business unit leader formal accountability for results in two areas: diversity of representation (hiring, promotion and mobility of underrepresented groups) and inclusion results that focus on day-to-day experience (employee engagement, psychological safety). It may also include linking bonuses to achieving goals. According to Bohnet and Chilazi (2025): *"When companies tie things like compensation or promotions to goals, they signal that they take these objectives seriously."*

> *"If you want to make your organisation more fair, you need to tackle the challenge with the same degree of seriousness as any other business issue."*
>
> **IRIS BOHNET** AND **SIRI CHILAZI,** AUTHORS OF *MAKE WORK FAIR,* 2025

FIGURE 4

Leadership sets the tone for the organisation...

- They connect the inclusion agenda to the purpose and goals of the organisation, so inclusion is **positioned as a way to succeed** as a business, ingrained into the way the organisation operates, rather than a nice-to-have. Common 'hooks' include reflecting the diversity of the customer base, driving innovation, the ability to attract critical talent or simply being the right thing to do.
- They **treat inclusion data and results as seriously as other business metrics** and make inclusion a regular discussion topic at executive meetings. Fiona Vines, Chief Inclusion & Wellbeing Officer at BT, said: *"What drives change is when leaders start asking questions about their inclusion data in the same way they would question financial or customer data. If a leader saw the slightest gap in EBITDA they would be straight on it, asking what's causing it and what are we doing about it. We need to be doing the same for inclusion data. If leaders are asking these questions, it motivates managers to look harder to understand the issues and identify actions."*
- They **role model inclusive leadership practices,** talk about inclusion and set out explicitly how they expect employees to behave. They require people to speak up when behaviour norms are breached, notice when people do this and talk about it publicly. According to Sull & Sull (2022): *"Leaders cannot improve corporate culture unless they are willing to hold themselves and their colleagues accountable for toxic behaviour."*
- They **ask questions that prompt action.** Fiona Vines suggests there are simple questions leaders can ask that show they care about this agenda. *"When they are being asked to approve spend on a new system, they can simply ask whether the system is accessible to everyone and refuse to sign off until they have an answer they find acceptable. Once they've asked that question a couple of times, no one is going to put a proposal to them that hasn't considered this."*
- They **act as sponsors** to emerging talent from underrepresented groups.

One example of a CEO championing inclusive practices is Phil Bentley, CEO of Mitie. He has set up a dedicated email account where people can *"Grill Phil"*. Anyone can write to him about an issue or concern and he will respond personally. He also talks about inclusion in all his internal communications and executive team roadshows where he and other directors visit different parts of the business.

2.2 MANAGERS

Just as important as the leadership team is the role managers play in creating an inclusive culture within their teams. Managers have the greatest impact on the day-to-day experience of employees. They determine whether team members have a sense of belonging in the organisation and feel included. They create micro-cultures with their own behavioural norms and routines and the environment created by managers determines whether people feel psychologically safe.

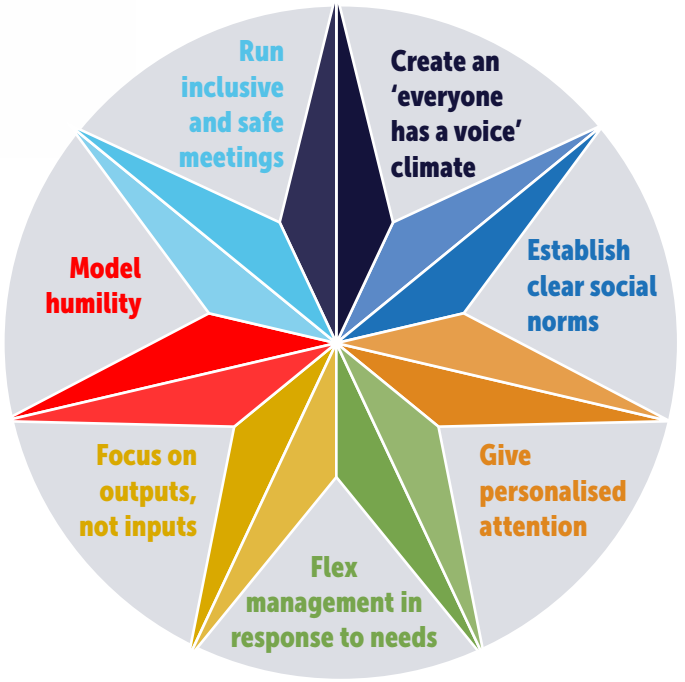
What do inclusive managers do? Our research highlights behaviours that differentiate inclusive managers:

- **Create a climate where everyone has a voice.** They pay attention to who is getting airtime in meetings and create space for constructive debate. They may establish team behaviour norms that allow everyone to feel included. In one example, a manager noticed that online participants in hybrid meetings tended to struggle to participate in deliberations once the conversation got going in the room. So they introduced a norm that online participants share their thoughts at the start of the meeting to make sure their perspective was included. Managers can ask questions such as: *"Am I investing my time and energy fairly across people who are 'like me' and those who are outside my immediate circle?" "Do team norms, such as in-jokes or informal activities, tend to exclude the same people?"*

> *"Middle managers and supervisors at every level in the organisation can create distinctive microcultures, even when they are subject to the same corporate policies, compensation plans, and other organisation-wide practices."*
>
> **SULL & SULL,** 2022

FIGURE 5

Behaviours that differentiate inclusive managers



- **Establish clear social norms.** Set out clearly what behaviour is expected and what is not acceptable in day-to-day interactions. Tackle non-inclusive behaviours.
- **Give everyone personalised attention.** Inclusivity is about more than including people from diverse backgrounds. It is a mindset that embraces every person as an individual and brings the full range of who they are into the workplace. Managers need to recognise that rapport and chemistry are important aspects of relationships but can lead to unequal treatment. Therefore, managers may need to make greater effort to build rapport with people who are less similar to them. Managers can ask questions such as: *"Am I clear, for each of my team members, what motivates them and how they would like to be managed?" "How can I establish rapport with team members who are 'different' to me?" "Do I divide my time equally among team members?"*
- **Flex management style in response to individuals' different needs.** Inclusive managers need self-awareness and empathy to understand what management style suits different individuals, and the skills to adapt their approach accordingly. Being inclusive is about treating people fairly and appropriately, not treating everyone the same. This is particularly important when a manager hires someone for the different style they bring – do they need extra support to be set up for success?
- **Focus on outputs, not inputs.** Set clear performance standards and judge people on the things that really matter, rather than who shouts loudest or who can most easily influence you. This is particularly important when leading hybrid teams.
- **Model humility** in what you know and don't know and admit mistakes.
- **Run inclusive and psychologically safe meetings.** Inclusive managers make sure everyone can voice their ideas or concerns and draw people into the discussion where needed, for example people whose first language is different to the majority. Meetings are also one of the most important places where psychological safety plays out in practice, so it is not just about giving everyone a voice but also sometimes allowing uncomfortable conversations that facilitate learning and improvement. Practical steps managers can take include appointing a neutral observer to take note of what happens in meetings and call out behaviours that work against inclusion. Whose ideas are adopted and whose are ignored? Are there patterns by gender, race etc. Rules such as 'no interruptions until the speaker has finished their point' or taking turns at who chairs regular meetings can establish inclusive team norms. Take an 'inclusion moment' at the start of a meeting to reaffirm team values around inclusion and set the tone for the discussion.

The important role that managers play in creating an inclusive culture has implications for the selection and development of managers:

MANAGER **SELECTION**

- Inclusive managers often have **different mindsets and skills** to what organisations have previously looked for in their managers, and this needs to be reflected in the job descriptions of managers and the criteria used to select them. For example, professional services firm Grant Thornton trains managers in inclusive mindset development and looks for this in leadership behaviours as part of its criteria for promoting people into senior roles.
- Having a **diverse cohort of managers** can also help underrepresented groups feel they belong. Research by McGinn and Milkman (2013) found that retention rates of junior staff in a law firm were highly correlated with their supervisor's demographic characteristics, particularly for women and people of colour.

MANAGER **DEVELOPMENT**

- **Teaching leaders about inclusive management practices.** Cox and Lancefield (2021) suggest training managers to *"personalise their interactions with their teams so they're more likely to create psychological safety and make equitable decisions regarding the processes they control including pay, performance measurement, promotions and work assignments."*
- While research has cast doubt on the effectiveness of delivering unconscious bias training to all employees, antiharassment training that focuses on managers only has been found to have more success in changing behaviours. Dobbin and Kalev (2022) suggest this is because the **training treats managers as allies** – as part of the solution not the problem. Instead of blaming managers, training them in tools to identify and interrupt unwanted behaviours and prevent situations from escalating can be impactful. The design of training interventions is crucial: focusing on building managers' skills and confidence through practice rather than moralising.
- Several organisations we interviewed have moved away from stand-alone training on inclusive leadership to **integrating it into existing management programmes.** This has the advantage of positioning inclusivity as a core expectation of managers (see below).
- Combine awareness raising with **coaching support**. Share comparative data and **benchmarks** on the impact of manager behaviours on their teams, for example engagement scores, employee turnover, performance ratings etc. This can be backed up with coaching and support for those managers who wish to improve.

CASE STUDIES

TEACHING INCLUSIVE LEADERSHIP

GRANT THORNTON has incorporated inclusive leadership training into its leadership development programmes. The programmes help leaders understand how their style might come across to others, the shadow they cast as a leader and how to develop strategies for adapting their approach to suit the situation.

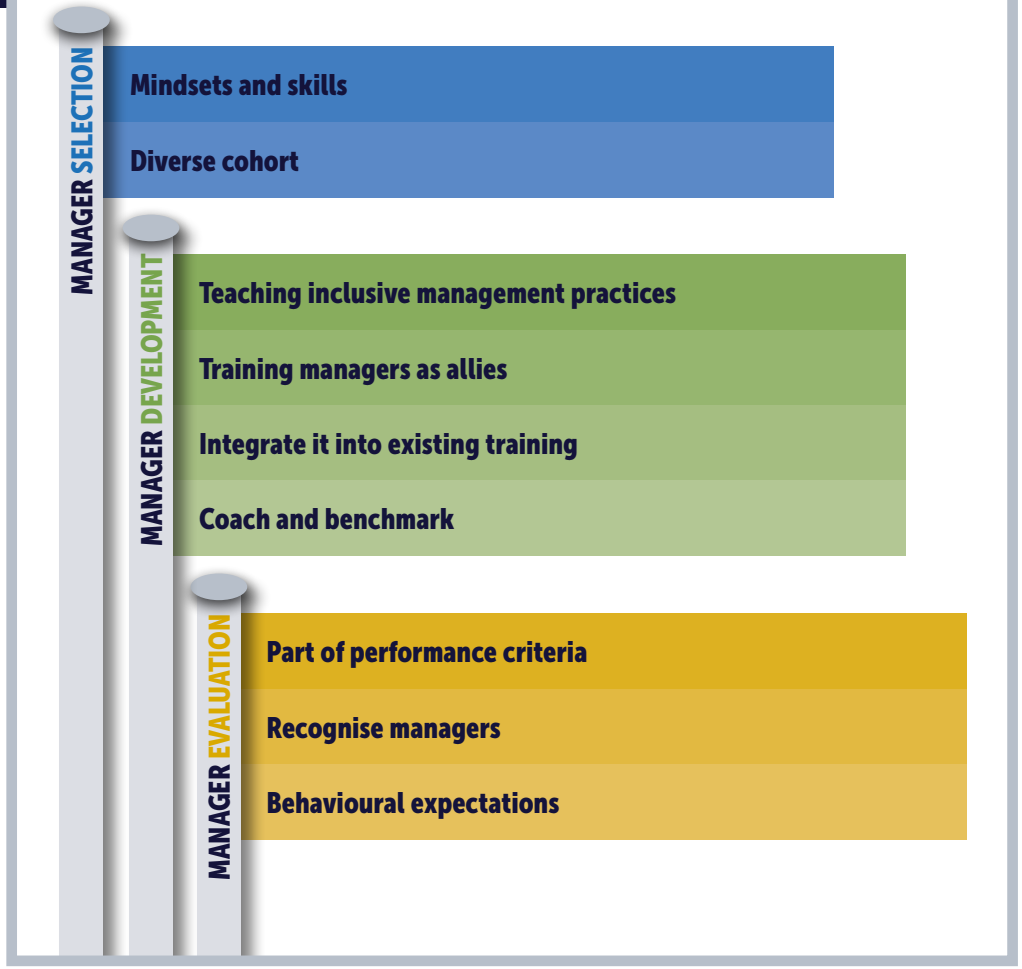
AVIVA has developed a training programme for managers to help them understand the real-life experiences of people at the company. It uses scenarios gathered from its Speak Up whistleblowing account to help managers work out how to treat each person as an individual and adapt their style to the different needs of individuals in their teams.

MANAGER **PERFORMANCE EVALUATION**

- Make inclusivity **part of the performance criteria** for managers and provide regular feedback on how managers are performing relative to their peers.
- **Recognise managers** who have good inclusion practices.
- **Make behavioural expectations clear** and tackle managers who achieve high performance but at the cost of creating non-inclusive subcultures.

FIGURE 6

The role managers play in creating an inclusive culture



2.3 INDIVIDUALS

It is important also to recognise the important contribution that individuals make to creating an inclusive culture. Inclusivity is about engaging everyone, not just elevating underrepresented groups. Ferdman (2013) highlights the ways in which inclusion is determined by individuals' perception of their value to the organisation and sense of belonging. Their experience is shaped in part by their personal attitudes but also by daily interactions with colleagues and organisational norms. Ferdman's research highlights key areas in which individuals play a role in developing inclusivity:

- **Self-awareness.** Individuals need to cultivate awareness of their own biases, assumptions and behaviours that affect others' perceptions of inclusion.
- **Receptiveness to feedback**
- **Intentional actions** such as active listening, turn taking and acknowledgment of diverse perspectives.

Individuals need to take responsibility for speaking up and challenging their peers or superiors when they observe non-inclusive behaviours. They have a responsibility for creating common ground with people who are different to them. They also need to be prepared to tell their own story. For example, if a woman is asked to share with a senior leader the challenges she has faced in advancing her career, she needs to be open about her experiences in order to educate that leader on how to think and act differently. Individuals also have a role in moving their own career development forward.

CASE STUDIES

HELPING INDIVIDUALS TAKE RESPONSIBILITY FOR CREATING A CULTURE OF INCLUSION:

Supporting individuals to speak up: NATWEST has rolled out Choose to Challenge, a simple framework known as the 4D's which colleagues can use if they come across non-inclusive behaviours. The 4D's are:

- **Direct** – Directly intervene in the moment.
- **Distract** – To alleviate the situation and then follow up afterwards.
- **Delegate** – Enlist the help of others to resolve a situation.
- **Delay** – Follow up afterwards, rather than in the moment.

Every situation is different, and the 4D's provide strategies for individuals to approach inappropriate behaviour in a way they feel comfortable with. Employees can access the e-learning resource on the bank's learning management system, which teaches them about the 4D's through group-based scenario team discussion and learning. This has been completed by over 50,000 employees.

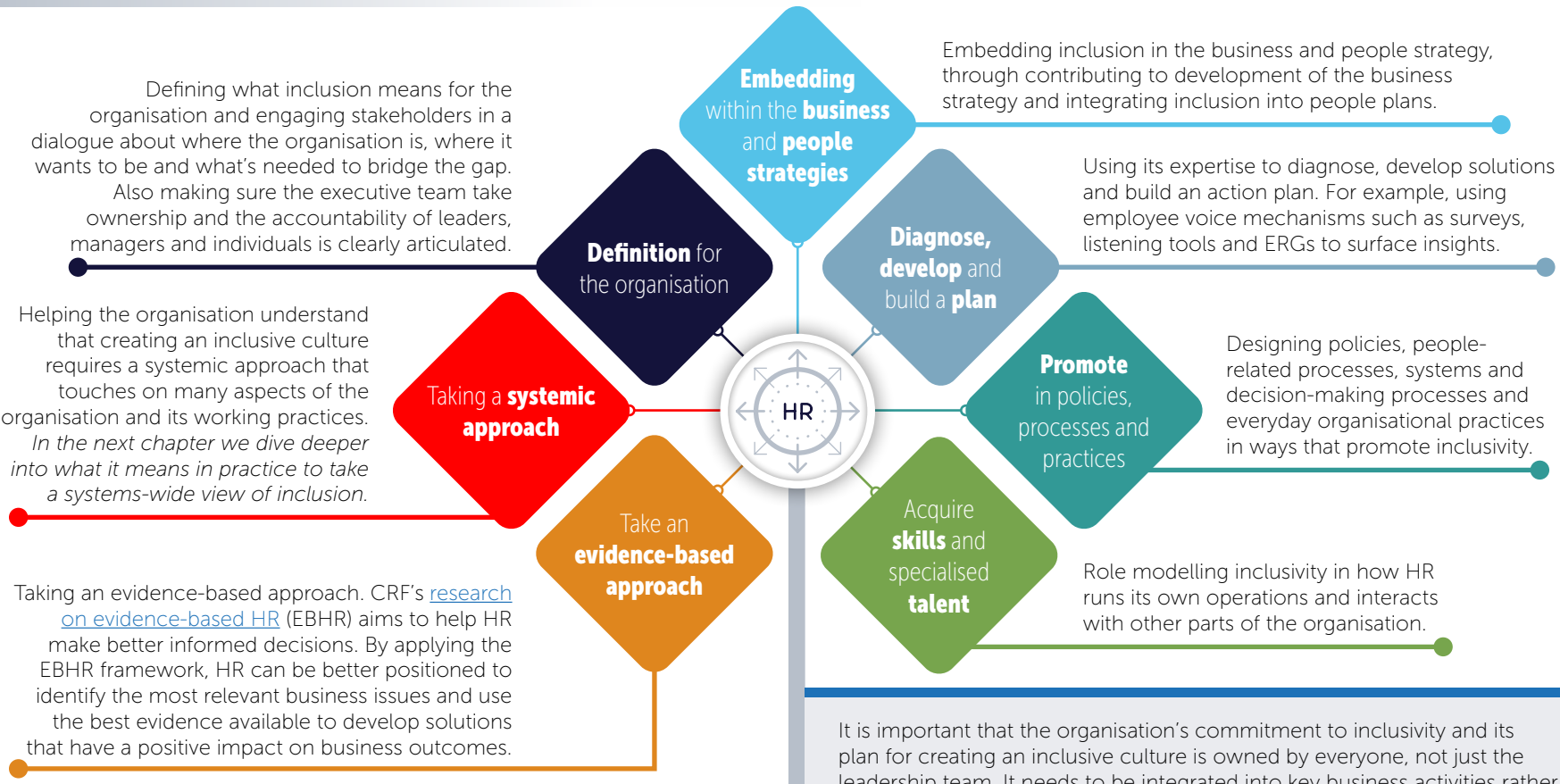
Setting behavioural expectations: BAILLIE GIFFORD has developed a programme to define and communicate expectations around behaviour and conduct, based on the culture and values of the firm. For example, articulating what effective collaboration would and would not look like. This was hooked onto the new conduct rules being rolled out by the Financial Conduct Authority, therefore linking to the core business and helping it to not only be seen as an HR initiative.

Inclusion allies: MITIE has developed a programme in partnership with Inclusive Employers to help employees develop the skills and confidence to act as allies for inclusion in the business. The programme helps attendees review their own experience of inclusion and provides them with tools to challenge behaviour that acts against the company's inclusion goals. The programmes include employees from all levels in the organisation and provides a vehicle for reverse mentoring. 300 employees have completed the programme since 2023 and 92% of attendees report feeling more confident about speaking up as a result.

2.4 HR

FIGURE 7

HR plays a pivotal role in creating and sustaining a inclusive culture



It is important that the organisation's commitment to inclusivity and its plan for creating an inclusive culture is owned by everyone, not just the leadership team. It needs to be integrated into key business activities rather than being seen as a side-show run by HR. HR therefore has to walk a fine line between providing expertise and support and being perceived as being responsible for delivering the plan on behalf of the organisation.

PANEL DISCUSSION – ROLES IN SHAPING INCLUSIVE CULTURE

At CRF's Creating an Inclusive Culture event, panelists **Sujata Bhatia, Lucy Fowles** and **Anthony Pickering** and Chair **Dr. Wanda Wallace**, discussed the roles that individuals, HR, middle managers and the senior leadership team play in creating an inclusive culture.

LEADERSHIP TEAM

- Senior leaders must set the tone from the top, modelling the culture they want to build and speaking openly about how they handle disagreements and mistakes.
- Leaders are often too senior or removed from day-to-day operations to fully grasp the realities of organisational micro-cultures. Employees may feel uncomfortable speaking candidly or lack incentives to do so.
- There is a constant tension between maintaining a strong, cohesive culture – which can unintentionally lead to groupthink – and creating genuine diversity of thought, background and behaviour – which may feel more complex or chaotic. The key is to be intentional: define what you're aiming to achieve, why it matters and how it supports business outcomes, then hold yourself and HR accountable for delivering on that vision.
- Leaders must recognise that people bring different agendas and perspectives. Avoid over-investing in single conversations or meetings and build a broader picture by triangulating evidence, data and track records. Understand that most people aren't being manipulative; they are sharing their view of reality.
- Senior leaders should avoid intervening directly when middle managers fail to demonstrate inclusive behaviours, unless the individual is their direct report. Responsibility lies with the relevant line manager. Instead, senior leadership should focus on setting clear, time-bound expectations that are acted upon by the appropriate level of leadership.

MANAGERS

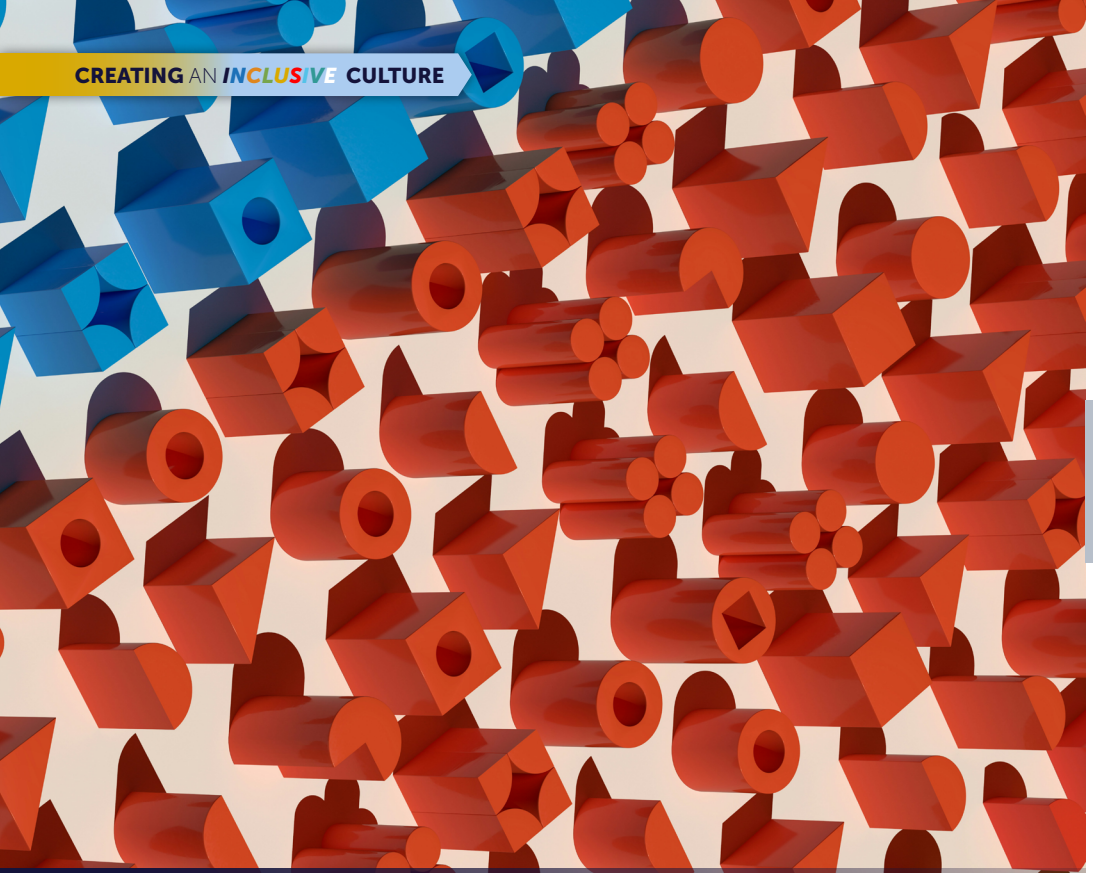
- Aligning with the broader business vision is challenging, especially when middle managers face competing stakeholder needs and unclear direction. Success depends on clarity – not just about goals, but about behaviours, trust and how people work together.
- Time is a major constraint. When managers are stretched thin, even small missteps in interactions can have lasting ripple effects and take significant effort to repair.
- While visible aspects of diversity are easier to track, real strength lies in diversity of background, experience and perspective – i.e. diversity of thought. These differences can be challenging to manage, but they provide the richest learning opportunities.
- Managing a diverse team requires deliberate effort. While homogenous teams may be easier to manage day-to-day, diverse teams lead to stronger long-term outcomes. That trade-off is constant and managing it well is a core leadership capability.
- Great managers don't just talk about creating psychological safety but build it in practice. They make people feel safe enough to take risks, tailoring support to each individual's journey and needs.
- When leaders lack confidence, their insecurity may show up as micromanagement or indecision. Managers should recognise that while they can offer support, they cannot instil confidence in someone else. Instead, they should anchor their team to the success of the business, rather than to the success or confidence of an individual leader.

INDIVIDUALS

- Creating the desired organisational culture starts with the individual. If individuals lack motivation or clarity about their goals, it's difficult for managers to provide meaningful support.
- Self-awareness is therefore key, knowing what you bring to the table and where you need to grow – both for current performance and future aspirations. Understand your blind spots and how you respond under pressure.
- Confidence and trust are also essential to embrace opportunities when they arise.

HR

- HR must be anchored in business outcomes. People professionals should align their thinking and policies around inclusion with the organisation's strategic goals to avoid disconnects between the people and business agendas.
- Coaching is one of the most powerful development tools that HR can provide. Its impact often exceeds that of classroom-based learning or standard training. However, relying solely on line managers for coaching can be limiting, particularly if they lack coaching skills.



3.0 DESIGNING AN INCLUSIVE CULTURE

This chapter sets out actions organisations can take to develop a culture of inclusion with examples from our research and event. We emphasise the importance of taking a systemic approach that involves all the key players discussed in chapter 2 and covers multiple levels and touch points in the organisation. The key point is that no single initiative will shift behaviours on its own. We also highlight the importance of crafting a strategy that addresses the unique needs of your business, which requires diagnosis and data before action.

3.1 CRF TAPESTRY FOR CREATING AN INCLUSIVE CULTURE

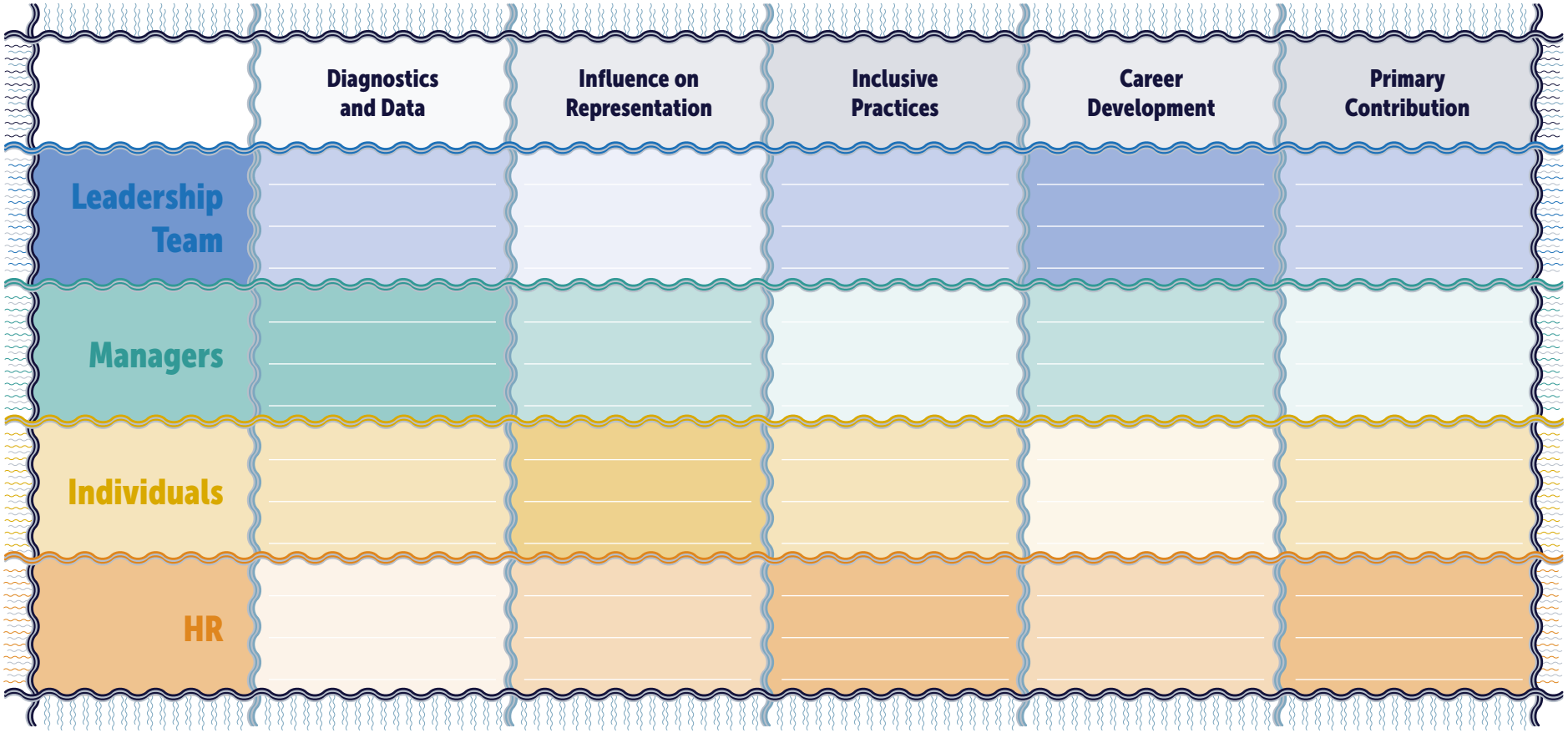
We use the tapestry metaphor to represent the idea that creating and sustaining a culture requires many threads to be woven together. It means viewing culture as a system where no one thing on its own determines the experience people have of working in the organisation. The horizontal threads set out the various actors in the system – each one with many things to do.

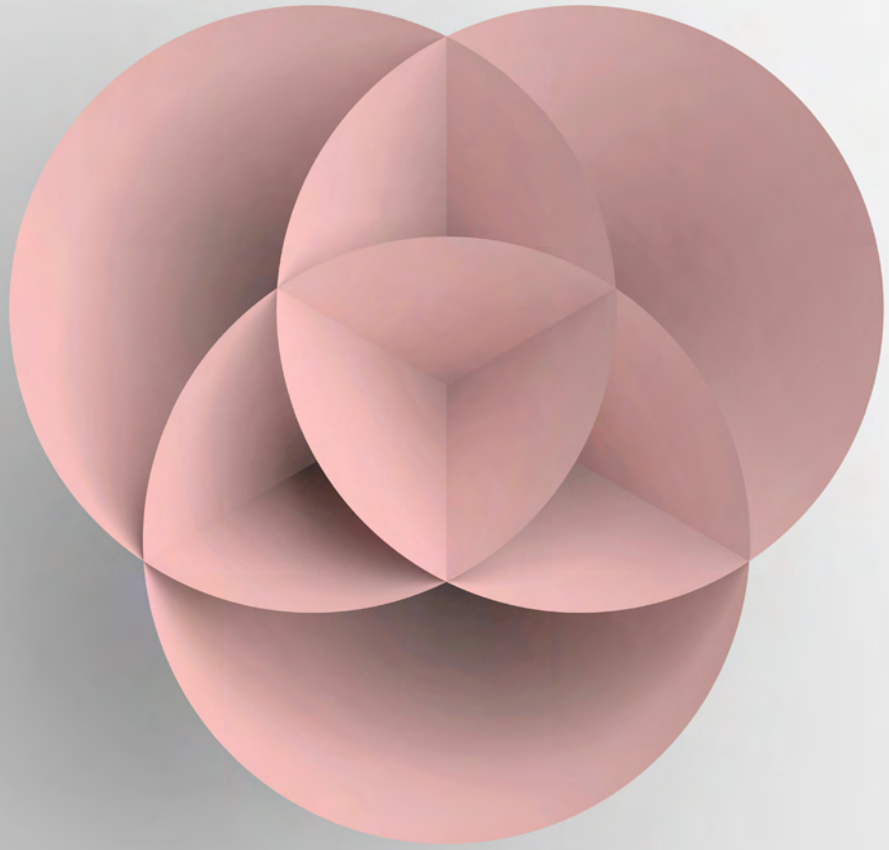
The vertical threads represent key action areas that embed inclusion in the waft and weave of day-to-day practices. For example, the leadership team's primary contribution is championing inclusion and holding their teams accountable. They might achieve this through paying the same attention to inclusion stats as financial metrics (Diagnosis and Data), refusing to sign off the business case for a new IT system until they are convinced it is accessible to the widest range of people (Inclusive Practices) and actively sponsoring high potential talent from underrepresented groups (Career Development). Use the Tapestry to map out steps you would wish to take in your organisation and identify who you need to have on board to make this happen.

CRF TAPESTRY FOR CREATING AN INCLUSIVE CULTURE

FIGURE 8

Inclusive Culture Tapestry





> *"You have to be really clear and specific about why you care about this as an organisation and how it relates to your business."*
>
> **FIONA VINES,** CHIEF INCLUSION & WELLBEING OFFICER, BT

3.1 A WHOLE-SYSTEMS APPROACH ROOTED IN THE BUSINESS STRATEGY

To make an inclusive culture stick, it's essential that it is rooted in the core work of the organisation. This means answering a key question: How might being inclusive enhance the success of our business strategy?

Different organisations will answer this in different ways, depending on their industry and business priorities. Some infrastructure or energy businesses have started with safety: inclusive cultures have better safety records. Consumer businesses may focus on reflecting the communities they serve in their workforces. Or it may be a question of fairness – inclusivity being the right thing to do to create equity or be more meritocratic. The important point is for business leaders to have the conversation about why it's important to the business, and to use this to guide choices around what actions to take.

This also means that DEI practitioners and inclusion specialists need to understand the business strategy, who are their customers and what drives performance in the business. This way you are better able to tailor interventions to the unique requirements of the business strategy.

Being systemic also means that all inclusion initiatives are joined up and consistent with each other. The focus needs to be on wiring inclusion in, what Jenn Barnett at Grant Thornton calls *"everyday inclusion"* and BT's Fiona Vines describes as *"inclusion by design."* This also means addressing the systems (how people are promoted) rather than *"fixing"* the people (expecting people from underrepresented groups to change their behaviour to fit in). Inclusion needs to be embedded in core management and people processes such as talent selection and development, performance management and how meetings are run. Everyone needs to be involved, not just a small minority of activists on the side.

It also means doing lots of things that together add up to something bigger. *"Sometimes people think inclusion is just a vibe,"* said Fiona Vines. *"But it's actually a host of thousands of things you do to make the day-to-day experience of work and the workplace inclusive."* BT uses the frame of Work-Worker-Workplace to diagnose and categorise the different initiatives required (see Case Notes below). Work might involve looking at uniforms or safety equipment – do they fit women as well as men? Worker recognises that the experience for call centre workers, field engineers and knowledge workers will be different. Workplace would consider whether physical and virtual workplaces are accessible and inclusive.

CASE STUDY **BT GROUP**

At CRF's Creating an Inclusive Culture event, **Fiona Vines,** Chief Inclusion & Wellbeing Officer, shared key insights from BT Group's approach to building an inclusive culture.

BUSINESS CASE

At BT Group, the business case for inclusion is two-fold:

- BT Group's products and services must work for all customers, which means having a workforce that reflects the diversity of the customer base.
- BT Group is committed to building a fair and inclusive workplace where everyone feels safe, valued and able to thrive.

INCLUSION PRINCIPLES

Actions around creating an inclusive culture need to be driven by the organisation's core inclusion principles – especially when navigating difficult decisions. At BT Group these include:

- Use data with purpose and act once there is sufficient data to inform meaningful change.
- Actively and regularly seek out and understand employees' lived experiences.
- Integrate inclusion into the design of systems, processes and decision-making.
- Inclusion goes beyond individual behaviours and requires rethinking the workplace itself. This means redesigning physical spaces, adapting policies and re-evaluating how work is structured.
- To create a truly inclusive culture, leaders must address the practical needs of different workforce segments – just as they would for a diverse customer base.

EMBEDDING INCLUSION

Elements of BT Group's action plan for driving inclusion structurally include:

- **Flexible Working:** BT Group has committed to supporting employees at different life stages through flexible arrangements, such as offering 16 weeks of paid parental leave to all parents.
- **Accessibility:** Ensuring workplaces are physically and digitally accessible.
- **Create respectful and psychologically safe workplaces:** Those who enter an organisation as the perceived 'other' are more likely to experience microaggressions, exclusion or serious harassment. While inclusion is often framed in terms of benefits, it is equally important to acknowledge and address the risks of harm.
- **Inclusive leadership is not optional:** It's a fundamental expectation of all modern leaders. Inclusion must be embedded throughout leadership behaviours, performance frameworks and the business strategy. Isolated DEI initiatives, if not integrated with core business priorities, are unlikely to achieve sustainable change.
- **Employee Resource Groups (ERGs) play a valuable role** in helping organisations listen to a wider range of employee voices. They provide a supportive environment for people to connect with others who share similar experiences, help to surface issues and offer valuable input by sense-checking ideas. However, ERGs should not be responsible for fixing systemic issues or driving inclusion initiatives – accountability must sit with leadership and be embedded within core HR processes.

Q HOW CAN ORGANISATIONS BALANCE RESPONSIBILITY FOR INCLUSION BETWEEN THE ORGANISATION AND THE INDIVIDUAL?

A The organisation always has the responsibility to create an environment of trust, fairness and inclusion. Organisations should be proactive and, rather than waiting to act when someone feels excluded, actively create inclusive environments from the outset. Trust is key, and this comes down to leadership behaviour. Practical ways to build this include being clear and consistent about your business case for inclusion and ensuring it resonates with your people, prioritising leadership capabilities to hold meaningful conversations and supporting leaders to take the first step. At BT Group efforts are focused on integrating inclusive behaviours into the everyday fabric of the organisation.

Q WHAT IS YOUR ADVICE ON FUTURE-PROOFING THE ACCESSIBILITY OF SYSTEMS?

A A key consideration should be who approves the investment. If decision-makers consistently ask, *"Is this inclusive?"*, it can have a significant long-term impact. Embedding this question into standard processes helps normalise inclusive thinking in system design and procurement.

Q HOW CAN WE MANAGE THE TENSION BETWEEN SHORT-TERM PERFORMANCE PRESSURES AND LONG-TERM GOALS WHEN SENIOR LEADERS DON'T SEE THE CONNECTION?

A This is why linking inclusion to business strategy is essential. It's the only way to protect DEI from falling victim to backlash or from leaders retreating from efforts.

Q WHERE DO YOU START WITH PRIORITISATION?

A It begins with accountability. Rather than choosing isolated priorities, the key is ensuring each part of the organisation understands its role and is embedding inclusion into day-to-day work. If inclusion is built into the design of your strategy, then it's less about picking priorities and more about aligning everyone to the same goal. Like any business objective, start with what matters most to the strategy and link inclusion to what leaders care about.

Q HOW DO YOU ENGAGE MIDDLE MANAGERS IN DRIVING INCLUSION?

A Middle managers are essential – they're the ones who shape the daily experience of inclusion. That's why inclusion capability must be embedded into leadership development. It's also important to acknowledge that middle managers are shaped by their environments, which may not have modelled inclusive behaviours. A broader narrative that inclusion is for everyone is key to bringing them along.

78% of CRF survey respondents report they **measure** their **culture** in terms of **inclusion**

3.2 DIAGNOSTICS AND DATA

Before deciding what to do, it's important to have a clear picture of where the issues are, both to determine what actions are most likely to be effective and to measure progress against goals.

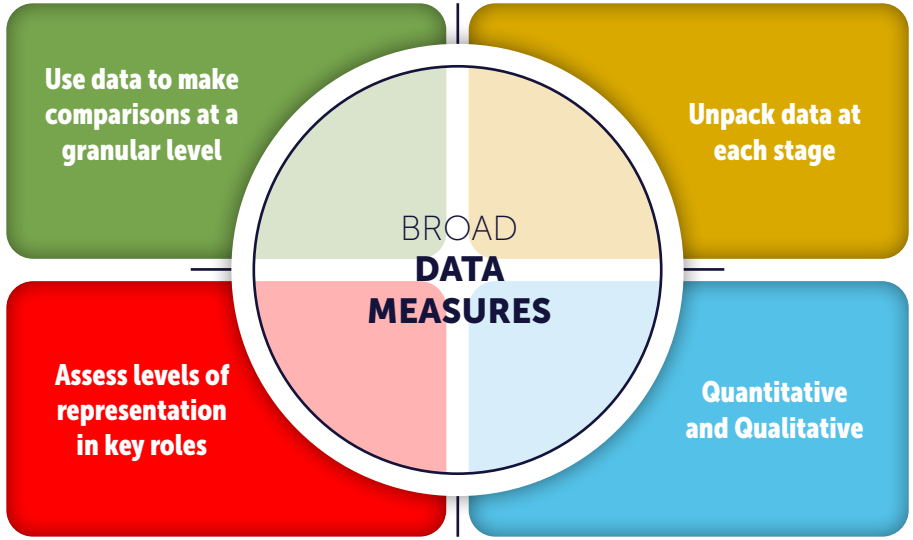
Data is critical. This is one of the biggest areas of progress we have seen in the last decade. Our 2025 survey found a strong focus on measurement, with 78% of respondents reporting they measure their culture in terms of inclusion, compared with only 20% of organisations in 2016.

Beyond simply having some broad measures, it's important to have data at the right level of granularity to pinpoint where in the organisation issues are occurring or at what points in the employee lifecycle people are leaving and why:

- **Slice and dice data to make comparisons across organisational units** or by manager, job family or location. For example, which managers have the highest turnover rates? How does this correlate with employee engagement data? How does it compare to industry benchmarks, salary data etc.? This allows interventions to be targeted accordingly and outcomes to be tracked.
- **Unpack data at each stage of the relevant HR process** to narrow down where to focus attention. For example, if the goal is to increase representation at senior leadership level, map out the talent management process end-to-end and work out where blockages are occurring. How long do men and women spend at each rank before progressing? At what point in their careers do underrepresented groups get stuck? For external recruitment, who applies compared to the available candidate pool? Who makes it through screening/each interview stage? Tracking this data by gender, race etc., allows potential points of bias to be pinpointed and addressed. For example, one organisation found that ethnic diversity was an issue at entry level but not gender, whereas at senior levels representation of women was the key issue. This led it to develop different solutions to increase representation of each group.
- What are the **levels of representation** in key business roles that tend to lead to promotions such as business development or key account management? Or in future facing roles such as product development and engineering? Are they sufficiently representative of the wider employee population so we have an inclusive future talent pipeline?
- Data can be **quantitative** (engagement survey scores, performance data, demographic data) or **qualitative** (feedback from ERGs or focus groups, stakeholder interviews, free text comments in employee surveys). Natural language processing tools make it possible to analyse text in social media posts etc., to get a read on sentiment.

FIGURE 9

The importance of data



CASE STUDIES

DIAGNOSIS

GRANT THORNTON undertook a root cause analysis to investigate the experience of underrepresented employee groups (the 'outsider experience within'). For each stage of the employee journey, from being a candidate through orientation, work allocation performance discussions and career progression, the firm brought together representatives of different groups and unpicked what was different about their experiences. The work highlighted six key barriers to address: development feedback, sponsorship, work allocation, succession planning, role models and people managers.

MEDIABRANDS reviewed all the processes in the employee journey to test for inclusivity and fairness. This included identifying all the decision points, control mechanisms, who influences the decision and who's involved, to determine whether the decision making was sufficiently objective and incorporated multiple perspectives.

ABF uses network analysis to gather insights on its organisation culture and identify the challenges faced by underrepresented groups. The analysis showed that women tended to have different networks to men – they were narrower but deeper. They were able to use these insights to be more tailored about what career advice and support was provided to which groups.

A challenge for many organisations is to get good demographic data and keep it up to date. Employees are often reluctant to share sensitive personal data and this is complicated by employers being prevented from asking in some jurisdictions. Employers are also interested in gathering a wider range of data, including sentiment data (how people experience the culture), socioeconomic status and neurodiversity, which can be both harder to define and sensitive. Transparency is important – why are you asking for the data, how will it benefit employees to share their data and what will the employer do with it?

Some organisations have run storytelling campaigns to encourage data sharing. For example, Mitie's This Is Me campaign showcases employees sharing their background story and showing that you can be open about who you are and still progress in the organisation. It concludes with a call to action for people to update their data on the HR system, which has resulted in an increase in declaration rates.

PANEL Q&A

Q HOW DO YOU LEVERAGE DATA TO SUPPORT AN INCLUSIVE CULTURE?

A Data should be viewed as an indicator rather than a definitive measure of success. Metrics such as diversity, regrettable attrition and overall attrition offer useful signals but must be contextualised.

A For new hires, post-90-day feedback can be especially valuable for assessing onboarding effectiveness and identifying early signs of struggle.

A A blend of quantitative and qualitative data is essential. While performance metrics (e.g. client interactions) show outputs, they don't reveal whether teams are inclusive or high-functioning.

A Consistent feedback gathered across levels and departments helps build a fuller picture. Large, diverse sample sizes are particularly useful when managing others.

A Feedback must be delivered thoughtfully and interpreted with awareness of the giver's perspective and potential bias.

Q WHAT ROLE DO ENGAGEMENT SURVEYS PLAY IN DRIVING CULTURE AND PERFORMANCE?

A A major challenge with engagement surveys is timing; by the time results are shared, the moment for action may have passed. Data is often too broad or outdated to offer team-level insight. More frequent sampling approaches can help.

A Engagement surveys can be valuable when tracking year-on-year trends or indicators related to manager enablement, recognition and blockers to performance.

A Open-text comments often provide the richest insights. Encouraging leaders to read and respond to these shows that feedback is being taken seriously.

A Follow-through is critical. When organisations act on survey findings but fail to sustain or embed change, it leads to deeper disengagement.

Q IS VULNERABILITY STILL CENTRAL TO INCLUSION?

A Psychological safety and trust rely on vulnerability, which remains essential to inclusion. Without trust, it becomes difficult to manage people – especially those different from you. However, vulnerability can manifest differently at the senior leadership level.

A Intention is critical. While vulnerability can emerge organically through relationship-building, leaders sometimes need to deliberately create conditions that encourage it, both in one-to-one interactions and at the team level.

A Vulnerability – particularly for women in business – can sometimes be misinterpreted as emotional displays. True vulnerability means being transparent about your experiences, asking thoughtful questions and being open to challenge.

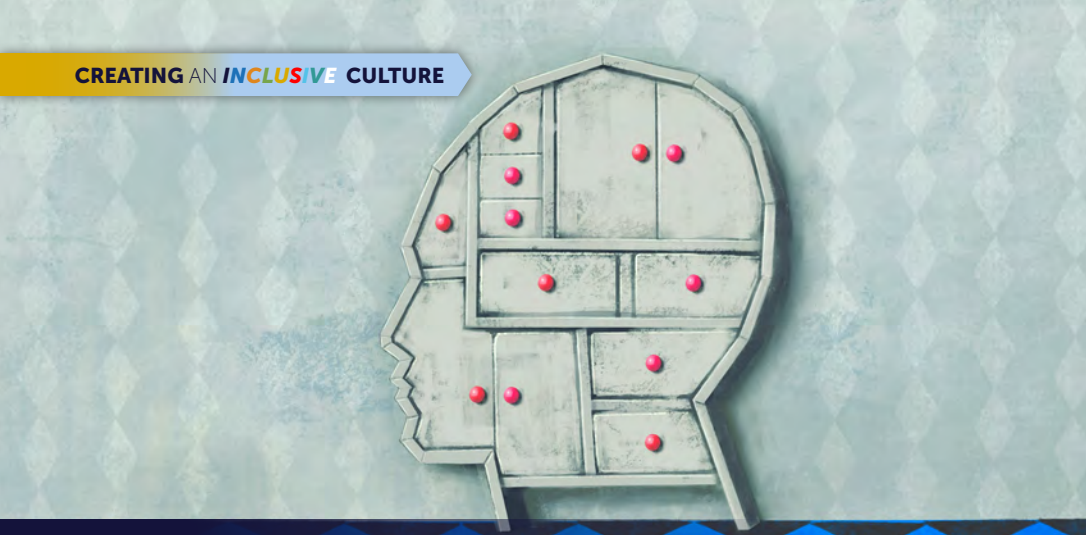
3.3
SETTING GOALS AND EVALUATING PROGRESS

Goals and targets can be a highly effective way of focusing attention and holding people to account. Diagnosis helps organisations set goals focused on the areas where action is likely to make the greatest difference. It's important for goals to be both realistic and sufficiently granular to be meaningful. For example, a broad goal around female representation across the workforce may not be granular enough when entry-level recruitment is 60% female but senior management representation is at 15%. This might call for differentiated goals by level or by business unit.

Bohnet and Chilazi recommend setting outcome goals not just for the top-level results you care about such as representation at the top level of leadership, but also for the drivers of those goals such as proportions of underrepresented groups in talent pipelines, allocation of stretch opportunities or top client accounts, visibility in front of the Board, participation in high potential programmes, etc. The proportionality principle (discussed further below) can also be applied to goals. If representation at the top team is 85/15 male to female and at the level below it's 65/35, a realistic goal may be for all slates for promotion to that level to be at least 35% female.

It's also important to have a process for evaluating the impact of initiatives and working out what is and isn't working. We recommend designing the evaluation process at the outset and setting a baseline of performance and metrics against which to measure progress after a predetermined timescale. Evaluation should include triangulating as many relevant measures as possible, combining both quantitative and qualitative data. Use the evaluation to identify opportunities for further improvement.

In our research we often hear stories of initiatives that kick off with great fanfare but have little impact longer-term. There is no shortage of good ideas in the inclusion space, but what works in practice will depend on the context of the organisation. Persistence and joined-up thinking are essential. Change is hard and takes time as well as ongoing support, senior management commitment and communication. Sustained effort over time is needed to shift the culture.



3.4 BRINGING STRUCTURE TO DECISION MAKING

One aspect that makes organisations less inclusive than they might like is that humans are inherently biased in their decision making. When making decisions we often use mental shortcuts (heuristics) which are hard-wired in our brains. These are often the source of bias, which comes into play when we select and evaluate people and process information. We have a choice – debias the people who make decisions about who should be hired or promoted in the organisation or debias the systems that drive how we make decisions.

The field of decision science offers insights around how to steer or 'nudge' people towards better choices. The goal is not to change people's mindsets but rather to achieve more objective decision making by structuring decisions or designing HR processes to reduce bias. According to Bohnet and Chilazi: *"People's actions change when the systems surrounding them change – even if their unconscious or conscious biases do not."* A 2009 meta-analysis (Mesmer-Magnus & DeChurch) found that structured decision-making processes can mitigate biases and improve team outcomes. The study suggests that having structured protocols for reviewing and sharing information can support better decision-making.

> *"The decision making infrastructure will either make or break the level of inclusion you have in the organisation."*
>
> **LYNN O'CONNOR,** SENIOR DIRECTOR, INCLUSION & BELONGING, CONVATEC

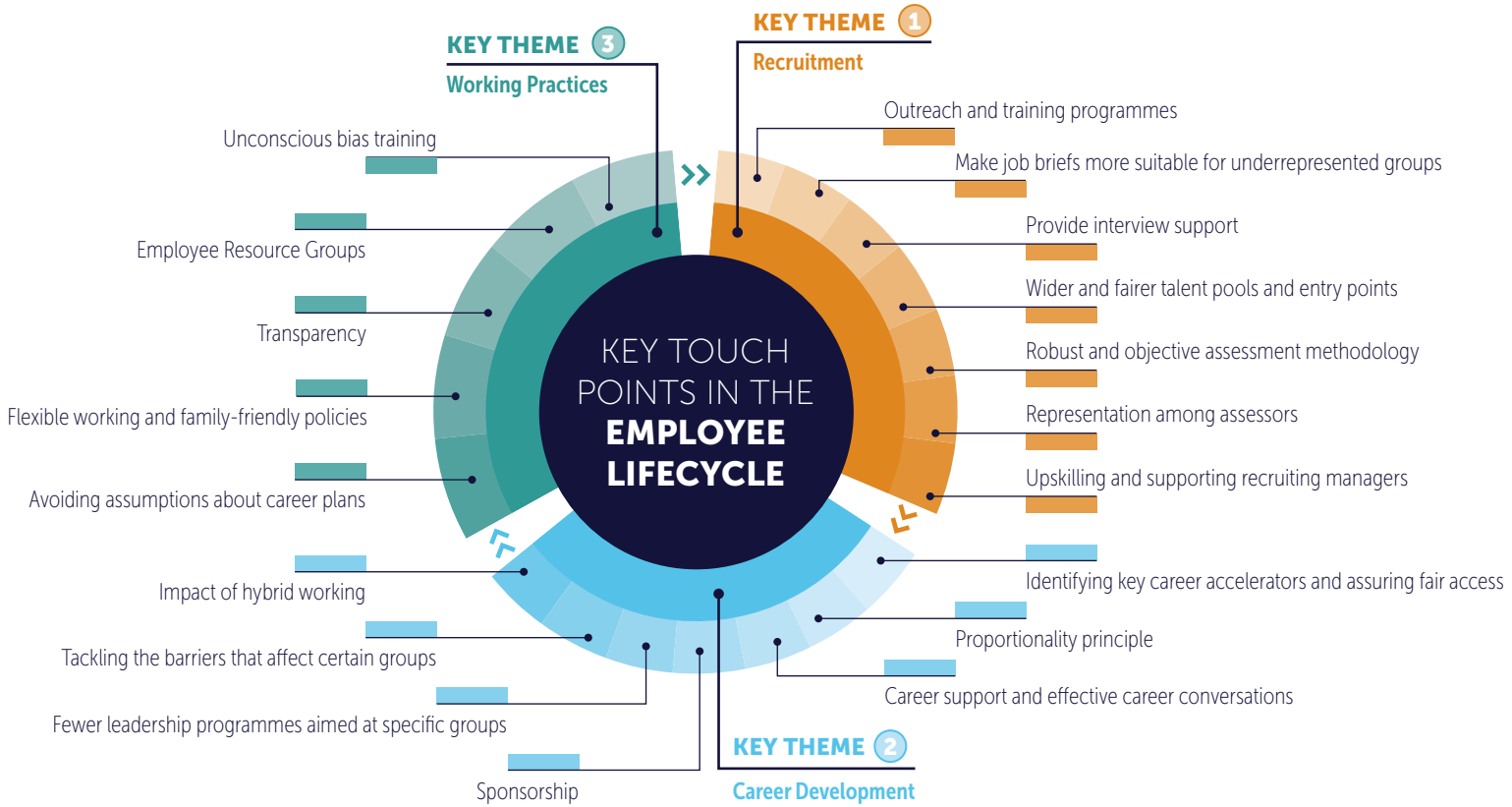
Some of the ways of doing this that emerge from our research include:

- **Widening the range of voices involved in decisions.** Numerous studies have shown that using the 'wisdom of the crowd' can lead to better decisions than relying on a single 'expert'. Organisations can harness this insight to increase objectivity in recruitment and promotion decisions. For example, before the review meeting, ask each assessor in an interview panel or participant in a talent review to record their judgment on each individual independently and anonymously. Have an independent reviewer summarise the feedback on each candidate. This makes it easier for participants to form their judgments freely without being influenced by others' opinions.
- **Priming decision makers to focus on inclusive decisions.** The late Fleur Bothwick OBE, author of Inclusive Leadership, recommended spending the first few minutes of talent review meetings reminding attendees of the core principles around bias and decision-making so they were brought into consciousness before individuals were discussed.
- **Defaults.** People tend to stick with whatever default is set, whether that's the settings on a phone or opting in to organ donation. Making the default more 'inclusion friendly' can improve outcomes and change perceptions. For example, making it the default that emerging leaders in underrepresented groups are allocated a senior sponsor. The UK Behavioural Insights team found that advertising jobs as flexible by default increased applications from women (BIT, 2024).
- **Removing irrelevant data.** In a job specification, only listing the job criteria that are essential and removing all other information can lead to a higher number of female applicants. Anonymising CVs has been shown to substantially increase the proportion of women and applicants of Asian origin who get through to the next interview stage.

3.5 KEY TOUCH POINTS IN THE EMPLOYEE LIFECYCLE

As discussed above, it's important to understand where in the employee lifecycle underrepresented groups encounter the greatest difficulties. Here we provide examples of actions organisations can take at some of these 'moments that matter' to make them more inclusive. While HR may take the lead in redesign, all stakeholders have a role to play, especially individuals who can share their experiences to help make the process feel more inclusive.

FIGURE 10



RECRUITMENT

Outreach and training programmes to encourage applications from underrepresented groups or demystify an industry. Penguin Random House has run a programme over several years which aims to inspire and inform underrepresented groups about careers in publishing. This includes offering 250 in-person work experience places annually with applicants randomly selected to ensure opportunities are open to all. They also run targeted programmes for applicants from lower socio-economic backgrounds, which have proved to be career accelerators. Insurance broker Lockton has partnered with external organisations to reach early-career talent who may not have considered a career in insurance, such as former military personnel. The company runs employability sessions and insight days to give people a taste of what it's like to work in broking and to help them prepare for the assessment. It's an opportunity to start to build connections with future hires. The company tracks whether those who attend the sessions go on to apply and compares their success rates with other applicants. Aviva partners with the Insurance Cultural Awareness network to make their recruitment channels more open to ethnically diverse candidates.

Make job briefs more suitable for underrepresented groups. Having too many criteria can disproportionately put off some groups from applying. Aviva limits the number of criteria in job advertisements to five because having too many can be off-putting, especially for women. It uses a textual analysis tool to remove any non-inclusive references such as gendered language and jargon. Transparency about salary bands in all job advertisements can also encourage a wider range of applicants and discourage salary negotiation which can lead to unfairness down the line.

Providing interview support to make the experience more accessible to all candidates. Penguin Random House's talent acquisition team offers optional pre-interview phone calls with candidates to help them understand what to expect and to identify any additional support they may need in the process. This can be particularly helpful for candidates from under-represented groups, who may face additional barriers to entry. It also provides information on its careers site on what to expect at the assessment. The UK's National Energy System Operator (NESO) offers candidates a buddy to support them through the recruitment process. For example, veterans applying for roles are offered a buddy who's also a veteran to share their experience of transitioning to civilian life.

Wider and fairer talent pools and entry points. Challenge established practices such as all hires must have a degree or only hiring from select institutions. Validate your internal data – do the criteria we use for recruitment genuinely predict who will be the highest performers? Baillie Gifford is moving away from only hiring graduates from elite universities and is offering modern apprenticeships to widen the pools of talent from which it can draw. Penguin Random House has removed the need to have a degree-level qualification and no longer allows unpaid or unadvertised internships or personal referrals so that opportunities are open to all. The Talent Acquisition team at Havas is measured on the diversity of candidate pools, not just at aggregate level but at each stage of the selection process.

Robust and objective assessment methodology. Identify the key requirements of the role that have been found to predict high performance and choose assessments that measure these. Use assessment techniques with the highest predictive validity and apply these consistently to all candidates. Make sure all assessors ask the same questions, in the same order. Ask assessors to assign scores immediately after the interview and not compare notes before doing so. Once all candidates have been interviewed, compare scores for each criterion/interview question in turn, across all candidates. So score each candidate's response to interview question 1 before moving on to question 2, and so on. This way assessments are less likely to be coloured by the 'halo effect' of a particularly good response to one criterion. Consider designating a 'devil's advocate' in the meeting where the candidates are discussed, to ensure that a fair, objective assessment takes place. Regularly validate your criteria and processes for hiring to check they predict the highest performers and are fair.

Representation among assessors. It's important to consider who candidates meet through the interview process. Do they see people like them in the process? This is likely to influence their interest in the role.

Upskilling and supporting recruiting managers. Invest in teaching managers how to hire objectively and inclusively and overcome affinity bias which can result in favouring candidates who are similar to them. See examples below.

CASE STUDIES

UPSKILLING MANAGERS TO HIRE INCLUSIVELY

NATWEST launched Inclusive Interview Ambassadors in the UK in 2021, as a pan-bank volunteer programme. The role of the Ambassador is to bring diversity of thought to interview panels, create an environment where candidates are relaxed and can do their best, and challenge line manager thinking where required. All Ambassadors have been upskilled through completing the Interviewing at NatWest programme, which includes 90 minutes of online learning covering inclusive interview practices and skills in interview scoring. As part of their training they also attend a session with the Talent Acquisition and Behavioural Science teams, to ensure they are skilled in supporting managers to avoid unconscious bias, which may impact decision making in interviews.

Managers at **AVIVA** are required to complete an accreditation – Licence to Hire – before they interview candidates. The Licence to Hire training walks the manager through the recruitment process end-to-end. It sets out the importance of having a wide talent pool and how managers can achieve this. It is designed to set up the hiring manager to give candidates the best opportunity to perform at the assessment and to equip them to make the most objective recruitment decisions.

CAREER DEVELOPMENT

Identifying key career accelerators and assuring fair access. One of the factors that often holds back the career progression of certain groups is that they miss out on the critical job assignments in earlier career stages that put them on a fast track to promotion. Therefore, some organisations monitor who gets assigned to big ticket or business critical projects, clients or roles, and check those decisions for bias. Charlotte Mintern at Associated British Foods suggests identifying high potential women early and encouraging them through good career conversations to put themselves forward for commercial roles that put them on a path to general management roles. This is not just HR's responsibility – individuals have a responsibility to put themselves forward and leaders to sponsor talented future leaders from underrepresented groups.

Proportionality principle. Many organisations find that, while representation is good at entry level, as people progress to more senior levels, the proportion of underrepresented groups goes down. Some organisations recognise that, while shifting representation at senior level will take many years of effort, they can gradually improve the profile of their senior population by design. Insurance broker Lockton uses the proportionality principle to challenge shortlists for promotion to ensure they reflect the profile of people at the level below, across characteristics including gender, ethnicity, disability and neurodiversity. *"It has allowed us to shift representation at senior levels significantly over the last five years,"* said Martyn Worsley, Chief People Officer.

Career support and effective career conversations. We often find that underrepresented groups do not progress as quickly or go as far as majority groups because they are not as well networked or have access to informal career support. Transparency around the criteria for promotion can help level the playing field. One interviewee said: *"What we hear is 'Yes I got feedback but it was polite feedback, not developmental. The work opportunities I had were safe work, not the type of high-risk but high-profile work that can really propel you forward. Yes I got access to senior people but I was never really sponsored.'"*

Sponsorship has been shown to play an important role in raising the visibility of high potential people from underrepresented groups and helping them develop the skills they need to advance to the most senior levels. It goes beyond mentoring in that the sponsor uses their influence with senior executives to act as an advocate for the person they sponsor. It's an opportunity for the protégé and their sponsor to work as a team to identify what needs to happen to get them promoted and how to overcome barriers that might prevent their progression. The sponsor is expected to commit to take actions to make sure their protégé actually gets the experience, introductions or support needed to move forward. It's also in the sponsor's interest to do a good job, as it can reflect badly on them if their protégé doesn't get promoted.

We have seen a shift away from leadership programmes aimed at specific groups such as women or ethnic minorities. Such programmes are sometimes criticised for focusing on 'fixing' the person rather than making the system fairer. For example, research by Jae Yun Kim et al. (2018) found when messages about gender equality emphasised women's potential to overcome gender bias through self-improvement as opposed to organisational barriers to women's advancement, people were more likely to support solutions that required women to change themselves rather than solutions that required the organisation to change its systems. However, for some industries where there is a lack of senior female talent, organisations are continuing to provide bespoke development, coaching and career support to underrepresented groups. Well-designed programmes help participants build career management skills and self-advocacy and create a supportive peer network. Lockton's Martyn Worsley said: *"We continue to see benefit in providing a confidential forum where women can talk openly about the unique career challenges they face and support each other."* Some companies give people from underrepresented groups a 'boost' as part of the leadership or talent programme. This might be additional support such as coaching or sponsorship in addition to the regular programme design.

Tackling the barriers that disproportionately affect certain groups. For example, Aviva's data showed people from lower socioeconomic groups were taking 1.4 years longer on average to get promoted, even though their success rate at entry level was on a par with others. They have a programme to encourage those from lower socioeconomic backgrounds to be ambitious and apply for promotion sooner. The campaign is spearheaded by the CEO of the Canada business, a woman who openly shares stories about the tough childhood she faced and what it took for her to have the successful career she has had.

Avoiding making assumptions about career plans. It's important to have a two-way dialogue with people about their career ambitions and constraints such as mobility. *"Just because someone has become a parent doesn't mean their career priorities have changed,"* said Jonny Briggs, Group Head Talent Acquisition, Aviva.

> *"We are looking at ways to level the playing field when you come into the organisation so that you can show yourself, and your potential, in the best possible light. We know that not all candidates have the same access to resources, information and support and so we try to set everyone up for success by being transparent and open about our approach."*
>
> **CLAIRE THOMAS,** DIRECTOR ORGANISATIONAL DEVELOPMENT AND TALENT, PENGUIN RANDOM HOUSE

WORKING PRACTICES

In the previous chapter we discussed the role managers play in making people feel included in day-to-day work interactions and meetings. There are also policy considerations around designing working practices such as flexible and hybrid working and parental leave in ways that promote inclusivity.

- **Impact of hybrid working.** On the one hand, hybrid working has expanded access to talent, making it easier for people with disabilities or caregivers to participate in work. Digital collaboration tools have also allowed more equitable participation in meetings and decision making. However, employers need to beware proximity bias, which can lead to employees who are physically present in the office having more influence or better work opportunities. Hybrid teams also need to work harder to be inclusive, as it is harder for remote workers to build relationships and feel they belong when they have less opportunity to interact with colleagues face-to-face.
- **Flexible working and family-friendly policies.** Career progression commonly slows down once people move onto a part-time working schedule or take parental leave. Some employers have taken steps to normalise and destigmatise these practices so everyone can benefit. Aviva is actively promoting job shares and using technology to make it easier for part-timers to have the same work experience as full-timers. All part-timers have access to MS365 which gives them a summary of what they've missed during their non-working time so they can catch up quickly and focus on what they need to do next rather than what they missed.
- **Transparency** can help people from underrepresented groups access what is often opaque information about what to expect regarding salary and career progression. Penguin Random House has rolled out a policy of pay transparency, so minimum and maximum salary ranges for pay bands are made available to colleagues. In addition, pay and career development guides support both managers and colleagues to have the best possible conversation. *"It means people know how to approach and structure their requests, and what to ask for, which some groups find more uncomfortable than others,"* said Claire Thomas.
- **Employee Resource Groups.** Our research indicates that ERGs are one of the most common practices supporting inclusion in organisations today. The range of interests and experiences they cover has also expanded significantly, in some organisations covering parents of teens, mid-career changers and pet owners. ERGs can foster a sense of community and belonging among groups facing the same experiences or challenges and can make people from underrepresented groups feel more heard and seen. However, the mere presence of ERGs does not create an inclusive culture and ERGs can have limited impact unless they are set up to influence the organisational systems that lead to inequity in the first place. The limited research on ERGs (see for example Welbourne (2017)), suggests they are effective at community building but less so when it comes to career advancement or allyship. As with other aspects of creating an inclusive culture, their impact depends on tying them into the core processes of the business that influence culture, such as management practices, leader selection and development and learning. For example, Mitie views their ERGs as potential talent pipelines to increase representation at senior levels, with ERG chairs having gone on to join high potential talent programmes. NESO tasks their Belonging ERG with upskilling the business on inclusive management practices. Its remit includes providing guidance, information and education. It has developed guidance on running inclusive meetings which has been rolled out in management forums, team meetings and internal conferences.
- **Unconscious bias training** is another common practice which needs to be treated with caution. There is now a body of evidence that shows training all employees is unlikely on its own to shift the culture and may actually be counter-productive. A 2018 evaluation of studies on the effectiveness of unconscious bias training conducted by the UK's Equality and Human Rights Commission concluded that there is a mixed picture on its effectiveness. While it can help raise awareness and may be effective in reducing implicit bias to some extent, it is unlikely to eliminate it. Its effects on behaviour change or reducing explicit bias are limited at best and it may backfire when participants are exposed to information that suggests biases are unchangeable.

CASE STUDY **AVIVA**

At CRF's Creating an Inclusive Culture event **Jonny Briggs**, Diversity Equity Inclusion & Executive Search Director at Aviva, talked through Aviva's approach to building an inclusive culture.

AVIVA'S DEI STRATEGY – THREE PILLARS

1. **Data, Governance and Accountability.** As an insurance company, data is core to Aviva's operations. It has helped measure progress and drive informed decision-making. Equally important is accountability, ensuring the right people are responsible for the right outcomes.
2. **People and Culture.** The majority of Aviva's DEI efforts are focused on talent, i.e. helping individuals thrive in the workplace, regardless of their characteristics. Rather than focusing solely on gender or ethnicity, their aim is to support every dimension of identity so that everyone can bring their best self to work.
3. **Customer and Community.** Aviva extends its DEI values beyond the organisation, for example, encouraging suppliers and partners to mirror their approach.

GROUP APPROACH AND AMBITIONS

- Aviva has shifted away from a rigidly target-driven approach, recognising that strict targets can sometimes mask the reality of what's happening on the ground.
- A key tool in their approach is a real-time employee engagement platform. One standout question: *"Can you be yourself at Aviva?"* – is intentionally defined by each individual, reinforcing that inclusion applies to everyone, not just underrepresented groups.
- Employee communities – of which six are available – are a fundamental part of Aviva's DEI approach. Lessons learned from the community process include:
  - Every ExCo member sponsors a community, in pairs, and attends quarterly meetings. This keeps leaders engaged, as they do not want to be the one who misses a session.
  - Initially, community co-chairs were appointed internally, which sometimes resulted in 'enthusiastic amateurs' – people with passion, but not necessarily the leadership skills to manage a group of 2,000+ members. The role has now been formalised as a leadership development opportunity with clear expectations and senior visibility.
  - Aviva expects communities to work in partnership with the organisation – bringing ideas, challenging constructively and helping prioritise initiatives, with the recognition that not everything can be done at once.

"THIS IS ME" CAMPAIGN

The *"This Is Me"* campaign allows colleagues to voluntarily record key characteristics in their HR system, such as gender identity, sexual orientation, faith and socio-economic background. As the requested data is highly sensitive, the campaign was preceded by clear communication around why the data was being collected (to help the organisation improve), who could see it (no one individually) and how it would be used (only in aggregate). Aviva achieved over 90% disclosure on gender and other core traits and over 80% disclosure across all other characteristics.

This data has also already driven tangible action. For example, analysis revealed that part-time workers' careers tend to stall, particularly impacting women (90% of Aviva's 2,500 part-time colleagues are women), enabling Aviva to take action in this area.

CASE STUDY **GRANT THORNTON**

Jenn Barnett, Head of Inclusion & Diversity and ESG at Grant Thornton, shared some key lessons from Grant Thornton's approach at CRF's Creating an Inclusive Culture event.
Grant Thornton is a professional services firm with 6,000 UK employees across 27 offices. As their value comes from the expertise of their people, creating diverse and inclusive talent is a strategic priority.

WHY FOCUS ON INCLUSION?

Inclusion should refer to the business case – what's in it for the business?

- The ability to have more meaningful conversations with clients by bringing diverse perspectives into the room – and encouraging those voices to speak up.
- Extensive research shows diverse teams make better decisions.
- Broadens the talent pool by appealing to a wider range of candidates.
- Supports being a sustainable business.
- Helps manage risk, encouraging a speak-up culture (particularly for audit work).

GRANT THORNTON'S INCLUSION & DIVERSITY (I&D) APPROACH

- The journey began by interviewing diverse talent to uncover key barriers, such as a lack of senior role models, developmental feedback, sponsorship and the impact of affinity bias.
- Prioritised social mobility, addressing systemic advantages. For example, children of finance professionals are 15x more likely to themselves work in finance. This insight led to outreach efforts to level the playing field for young people from lower socio-economic backgrounds.
- Agreed inclusion and diversity principles with the board. Each principle receives equal investment and enables ongoing data-driven progress checks.
- Identified four cultural steps to build inclusion:
  - Business-led sponsors and senior role models.
  - Data-driven accountability – data collection must lead to action.
  - Skills development – training focused on allyship and used 'call-in' behaviours instead of 'calling out.'
  - Three strategic action plans, based on the pillars of Getting In, Getting On, and Belonging.

- **Getting In:** Focused on broadening recruitment reach and accessibility, working with partners like BITC and Disability:IN. Emphasis was placed on valuing uniqueness over cultural fit.
- **Getting On:** Data analysis across social mobility, gender and ethnicity led to insights. For example Black women from low socio-economic backgrounds were least likely to achieve high performance ratings or promotions. Sharing insights with the board led to stronger scrutiny of ratings and decision-making.
- **Belonging:** Self-managed communities were empowered with budgets and light-touch governance to lead their own initiatives. This created ownership while allowing the central I&D team to stay focused on strategic and business priorities.

PRACTICAL INCLUSION ACTIONS FOR LEADERS

Grant Thornton trains leaders to take everyday inclusion actions, such as:

- Be transparent about performance – if something isn't working, don't sugarcoat it.
- Monitor unpaid team tasks – tasks like organising socials or taking minutes often fall to women and are undervalued.
- Examine performance processes – who is reviewing performance and where might bias be hiding?

Q WHAT ACTION DID YOU TAKE REGARDING TRANSPARENT PERFORMANCE MANAGEMENT?

A We introduced early-stage interventions in the performance review process to identify potential bias before final ratings were agreed. For example, we reviewed trends (e.g. underrepresentation of high ratings among Black women) and challenged discrepancies.

These interventions were led by the Head of People and Culture and escalated to the ExCo, reinforcing the message that fair performance management is a leadership responsibility. The process resulted in some rating changes and, more importantly, greater awareness and education across the business.

4.0 CONCLUSIONS

CREATING AN INCLUSIVE CULTURE

Creating an inclusive culture is not just work for HR – it is a business imperative. High performance stems from a focused, data-informed approach that connects inclusion efforts directly to the business outcomes that matter most. Rather than treating inclusion as a stand-alone programme, organisations must embed it into the core of their business strategy by asking: How might being inclusive accelerate our current goals or shape our future direction?

Success requires a collective effort. Senior leaders must provide visible sponsorship, managers must foster inclusive team environments, individuals must take responsibility for their actions and HR must drive systemic change. Inclusion cannot be owned by one group alone – it's a shared endeavour.

Finally, meaningful change takes time. Real progress depends on consistency, perseverance, and a commitment to follow through. It's the accumulation of everyday behaviours, embedded systems and ongoing reinforcement that will ultimately build a culture where everyone can thrive.

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