

10 JUNE 2025

# CREATING AN INCLUSIVE CULTURE

With special thanks to CRF Programme Partners

activpayroll

aps

Bird & Bird

bts  
Strategy made personal

IMD

Mercer

rhr

RICOH  
imagine. change.

And to CRF Knowledge and Event Partners

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Ambition Unleashed

Beamery

headspring  
executive development

HULT ASHRIDGE  
EXECUTIVE EDUCATION

Inclusive  
Employers

LHH  
Recruitment  
Development  
Career Transition

The Oxford Group  
A City & Guilds business

Talent Solutions  
Marpower Group



WIFI Network: ICAEW Guest WIFI Password: Gov3rn@nc3

# PLEASE NOTE



**NO FIRE ALARMS**  
**are planned for today**

If a fire alarm does go off,  
please follow the indicated  
**exits** out of the building



**RESEARCH AND**  
**POST MEETING NOTES**  
**will be shared next week**

# SOCIALS

Please tag **CRF** into all event posts



Corporate Research Forum  
(**CRF**)



**@C\_R\_Forum**  
**#CRForum**



**@corporateresearchforum**



**@CRF\_PARC**

# AGENDA

## Tuesday 10 June

10.00	<b>Welcome and Scene Setting</b> , <i>Gillian Pillans and Dr. Wanda Wallace</i>
10.20	Table Introductions and Discussion
10.35	<b>CRF Framework for Creating Inclusive Cultures</b> , <i>Gillian Pillans and Dr. Wanda Wallace</i>
10.50	<b>Case Study: BT. Taking a Systematic Approach to Building Inclusion</b> , <i>Fiona Vines</i>
11.15	Table Discussion
11.35	<i>Break</i>
12.00	<b>About CRF</b> , <i>Rosanna Neary</i>
12.05	<b>Panel Discussion: Roles in Shaping Inclusive Culture</b> , <i>Dr. Wanda Wallace, Lucy Fowles and Anthony Pickering, Sujata Bhatia</i>
13.10	<i>Lunch</i>
14.10	<b>Case Studies: Aviva and Grant Thornton. Unique HR Strategies that Drive Inclusion</b> , <i>Jonny Briggs and Jenn Barnett</i>
15.00	<b>Reflections and Commitment</b> , <i>Dr. Wanda Wallace</i>
15.30	<i>End of Day</i>

# CREATING AN INCLUSIVE CULTURE

## Welcome and Scene Setting

**CHAIR:**

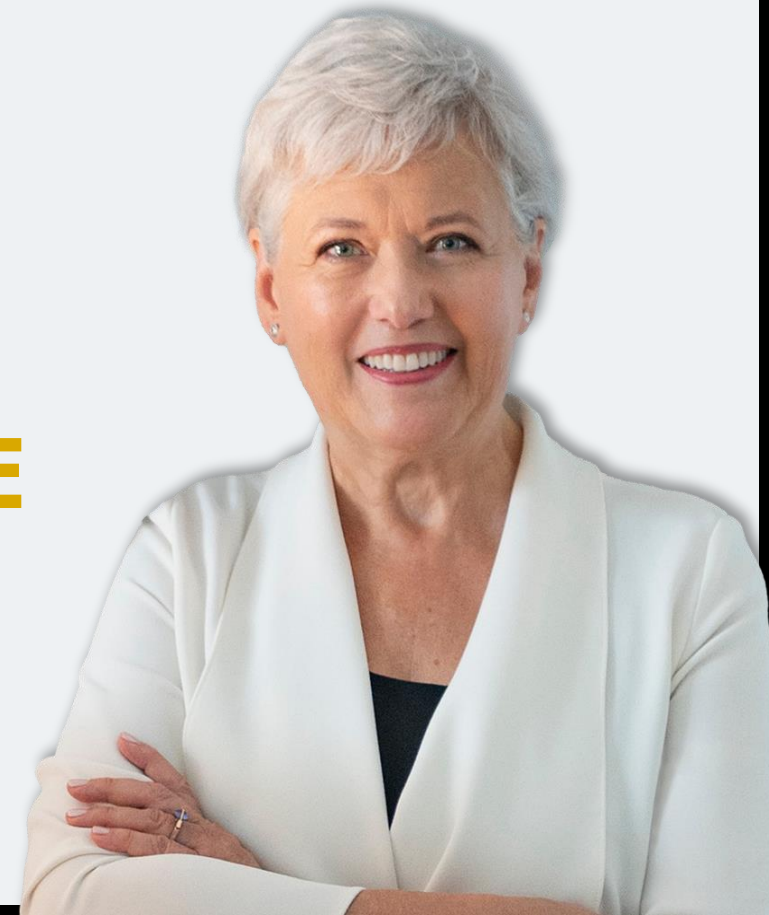
**GILLIAN PILLANS**

Research Director, CRF

*and*

**DR. WANDA WALLACE**

Managing Partner, Leadership Forum Inc.



# DEFINITION

**“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.”**

# WHAT DOES IT MEAN TO LEAD INCLUSIVELY?

Whether you are  
inclusive or not  
is a **judgement**  
based on the  
*feeling of the  
minority.*

## What leaves people feeling included?

- My voice is heard.
- I am not left out of events or conversations.
- My opinion is sought.
- My opinion is considered.
- I feel I belong as much as anyone else.
- I believe I have as much opportunity as anyone else.
- I have the same access to upper management as anyone else.
- I have the same opportunity to influence decisions as anyone else.
- I trust and am trusted.
- I am seen as a unique individual.
- I don't feel I need to hedge my point of view.
- I don't feel that I have to hide part of who I am.
- I don't feel that I have to become someone else to belong.

Great leadership **looks just like inclusive leadership.**

# WHAT DO PEOPLE WANT TODAY?



- ★ Care about me as a person, not just what I produce
- ★ Fair in how you treat me and others which requires transparency
- ★ Give me opportunities to learn and develop
- ★ Use my time wisely or expect to pay a LOT
- ★ Allow me to contribute from day 1
- ★ Tell me why are we doing what we are doing – a bit of purpose

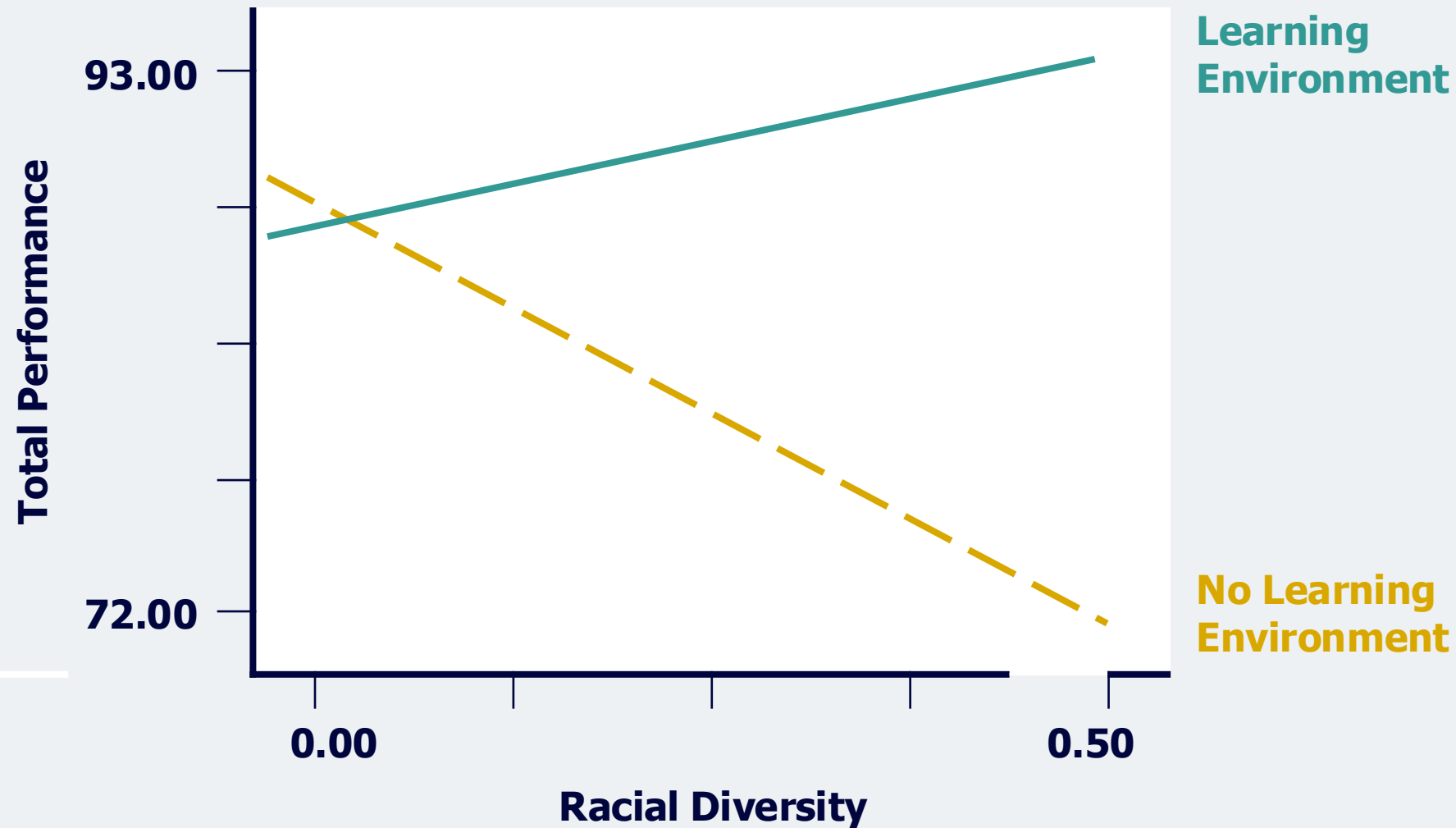
## REFERENCES

Mercer *Global Talent Trends, Feb 2024*  
Kate Bravery et al, *Work Different*  
Ryan Jenkins, *Connectable*  
Tim Elmore, *A New Kind of Diversity*  
Kim Scott, *Radical Candor*  
Donte Vaughn, *Culture to Culture*

# RESEARCH ON WORKING TEAMS

- ✓ Data from over 800 retail bank branches in the US
- ✓ Racial diversity of each team is assessed between 0 (*all white or all minority*) and .50 (*50/50 balance*)
- ✓ Ely, Thomas and Padavic, *Harvard Working Paper: Radical Diversity, Racial Asymmetries and Team Learning Environment: Effects on Performance*, 2010; published by *Organizational Studies*, March 2012, Vol 33, no. 3.

# US RETAIL BANK BRANCHES



# DEFINITION OF A LEARNING ENVIRONMENT

**'Learning Environment'** was *defined* as:

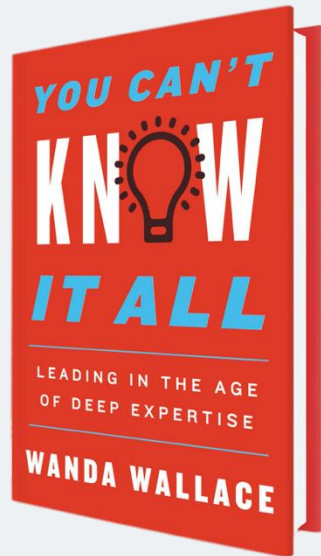
- Sharing information
- Asking for help
- Seeking and giving feedback
- Discussing errors
- Looking for new and better ways to do things

**'Learning Environment'** was *assessed* by survey questions:

- My work group has a climate in which diverse perspectives are valued.
- I feel encouraged to come up with new and better ways of doing things.
- My supervisors encourage a diversity of styles and approaches.
- Sufficient effort is made to get the opinions and thinking of people who work here.

# WHAT CAN YOU DO?

- Do not expect people to think, act, be motivated like you. **Ask and adapt.** Explain your preferences.
- **Listen.** Practice listening intently for 4 minutes. Ask a follow-up question only if you are genuinely interested. Conclude with: 'Thank you for telling me.' and 'Here's what I am taking away.'
- In meetings **make sure everyone speaks**, equally often and in random order.
  - If someone is talked over, redirect back to the person.
  - If someone doesn't speak, ask him/her a question.
  - Actively seek dissenting opinions: What have we missed here?
  - Encourage your team to get to know everyone in the team. No exceptions.
- Monitor how you spend your discretionary time – **where and with whom?**
  - Be equally available with equal energy for everyone on your team.
- At talent reviews and promotion discussions, insist on accurate behavioural descriptions of common phrases like 'executive presence' and 'team player' or 'safe pair of hands'. **Get concrete evidence.**
- Consider where **nudges** will improve equity and perceptions of equity.
- Give candid **feedback to everyone.**
- **Share your vulnerabilities** – mistakes, weaknesses, limitations, gaps, etc.
- When someone else speaks up about an inequity, **back him/her up.**
- **Try, apologise and then keep trying.** No one is perfect at this ever.



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## Wanda T Wallace, PhD

Coach | Speaker | Author



Wanda Wallace



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@wandawallace



@askwanda

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[www.leadership-forum.com](http://www.leadership-forum.com)  
[www.outofthecomfortzone.com](http://www.outofthecomfortzone.com)

### Websites

[www.leadership-forum.com](http://www.leadership-forum.com)

[www.wandawallace.com](http://www.wandawallace.com)

[www.outofthecomfortzone.com](http://www.outofthecomfortzone.com)

[www.exceptionalleader.com](http://www.exceptionalleader.com)

### Twitter

@AskWanda <https://twitter.com/AskWanda>

### LinkedIn

<https://www.linkedin.com/in/wanda-wallace-028a798/>

### FaceBook

<https://www.facebook.com/WallaceOutOftheComfortZone/>

<https://www.facebook.com/wanda.wallace.3150>

### Instagram

<https://www.instagram.com/wandatwallace/>

### YouTube

@wandawallace

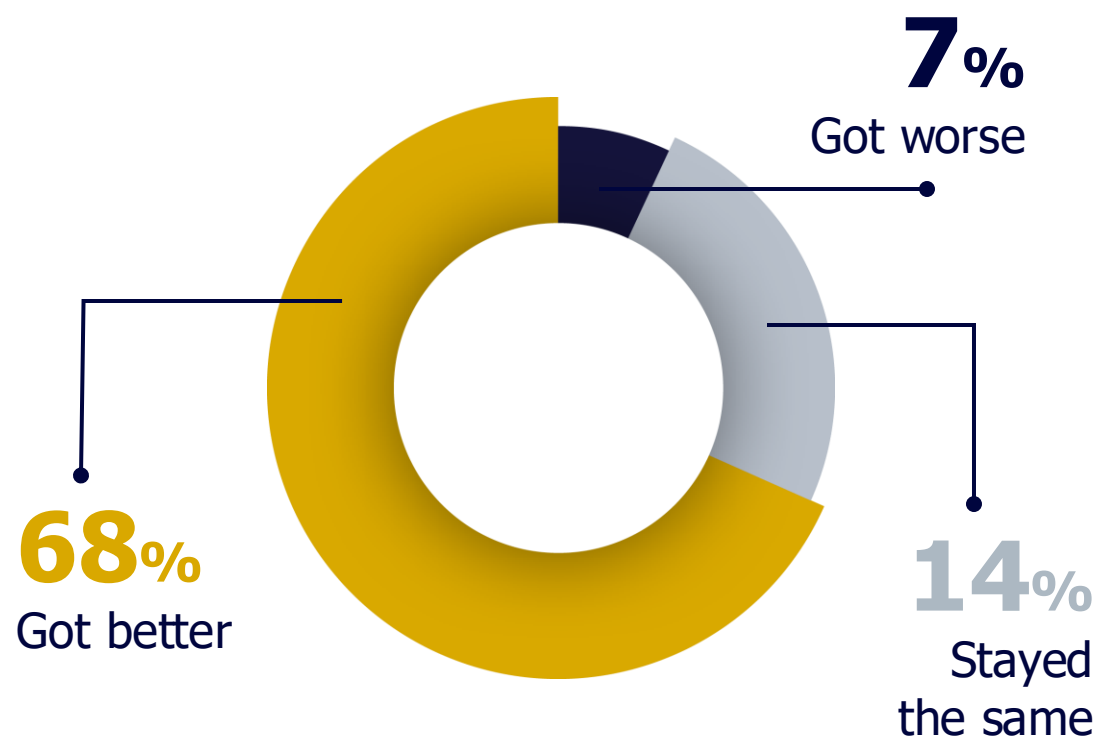
<https://www.youtube.com/@wandawallace>

### TIKTOK

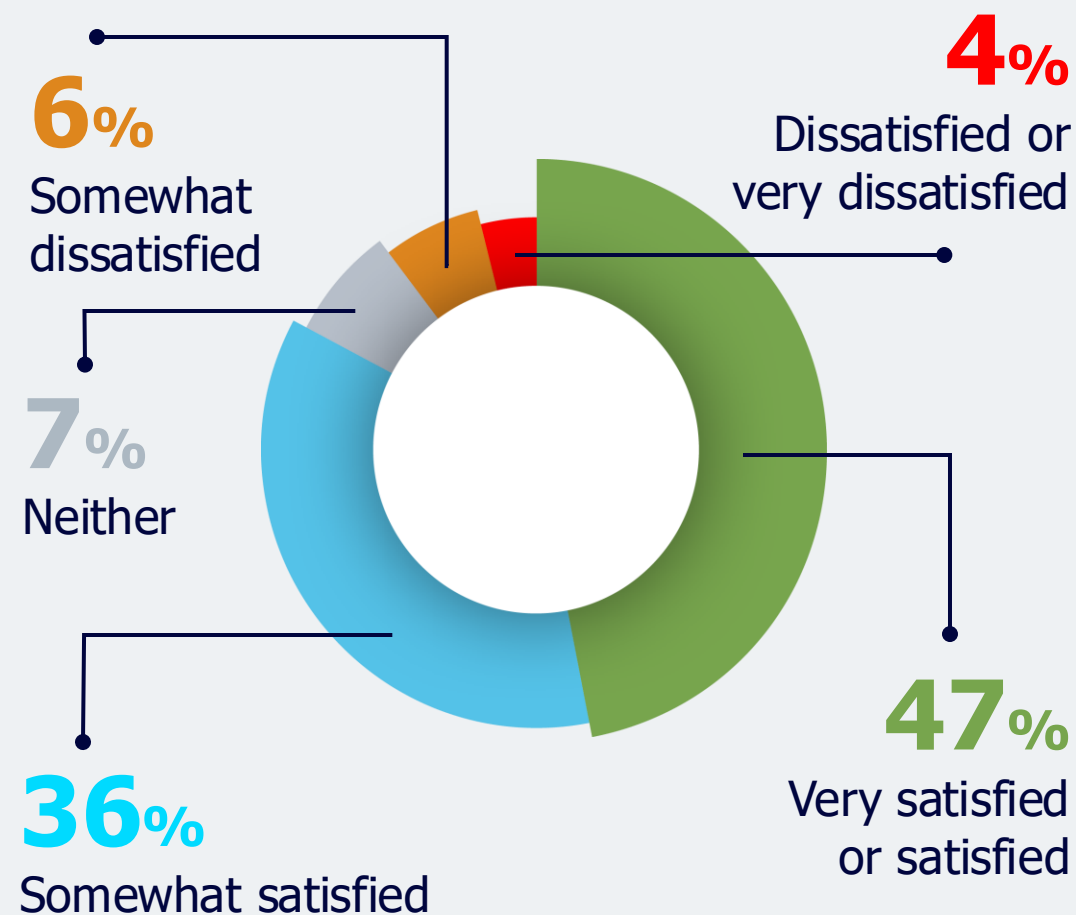
@askwandawallace

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[p=1&sender\\_device=pc](https://www.tiktok.com/@askwandawallace?is_from_webap)

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



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



# TABLE QUESTION

**Where do you think you  
need to push yourself  
and your organisation?**

CREATING AN INCLUSIVE CULTURE

## CRF Framework for Creating Inclusive Cultures

**CHAIR:**

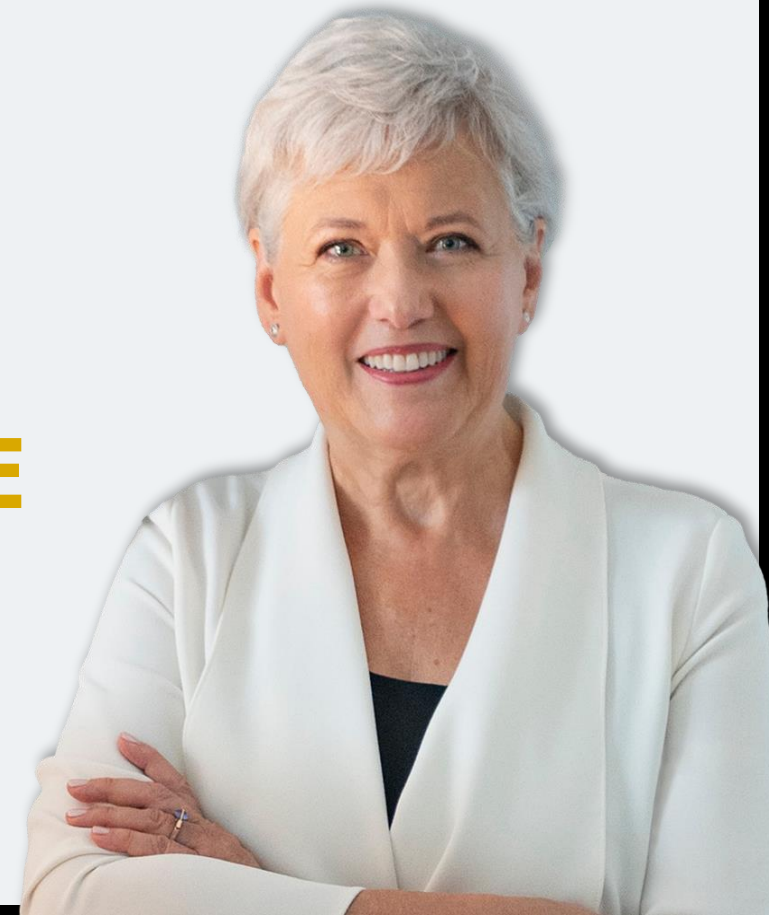
**GILLIAN PILLANS**

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*and*

**DR. WANDA WALLACE**

Managing Partner, Leadership Forum Inc.



# INCLUSIVE CULTURE TAPESTRY

	Diagnostics and Data	Influence on Representation	Inclusive Practices	Career Development	Primary Contribution
Leadership Team					
Managers					
Individuals					
HR					

# CREATING AN INCLUSIVE CULTURE



## **BT Case Study:** Taking a Systemic Approach to Building Inclusion

**FIONA VINES**  
Chief Inclusion Officer, BT Group



# Inclusion at BT

Inclusion | Diversity | Equity | Accessibility | Wellbeing



# Inclusion and Wellbeing

## Strategy Development

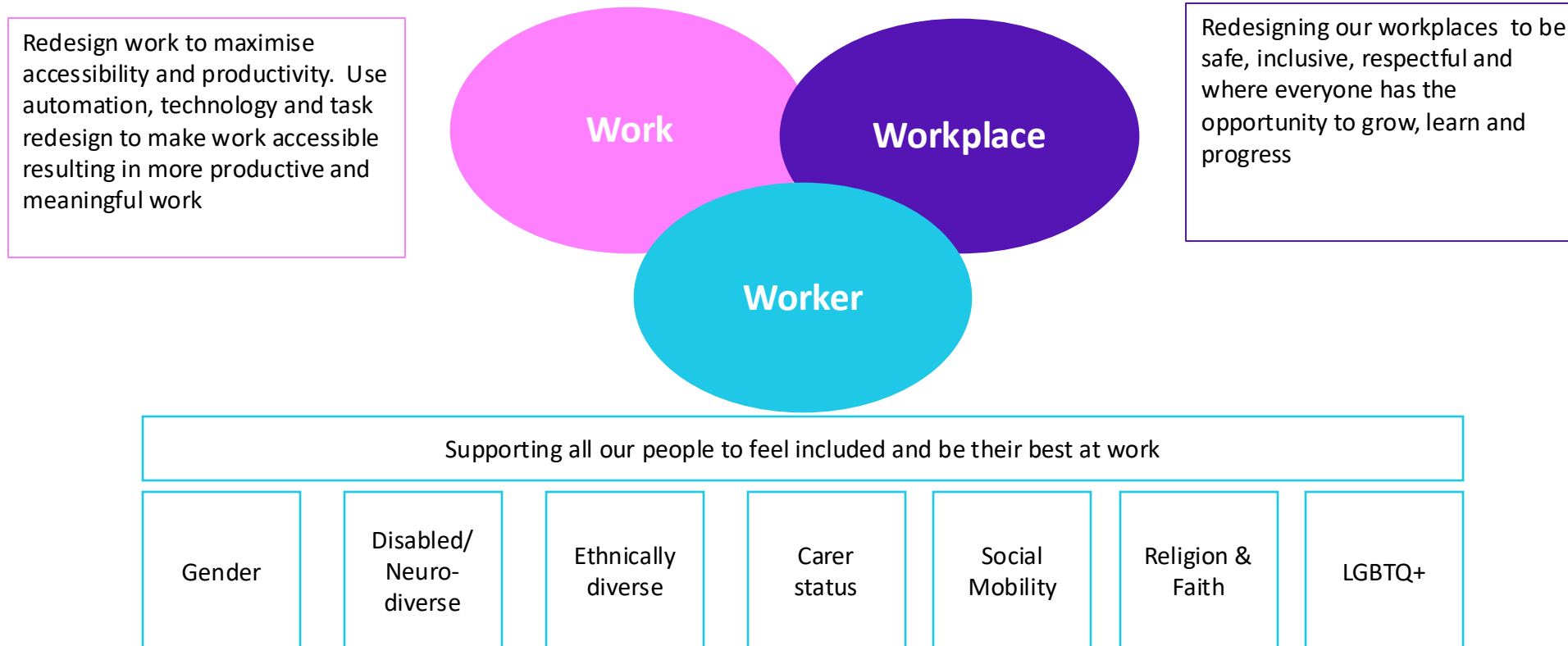


## Principles

1. Having a workforce that reflects our customers
2. We do Inclusion by Design
3. We take action to remove barriers faced by people from underrepresented groups
4. The people facing the barriers are not responsible for fixing them
5. We trust our people

# Our Approach to development of the BT Group Inclusion Plan

We identify and take steps to remove barriers to inclusion in the way **Work** and **Workplaces** are designed, to tackle structural bias and level the playing field for all **Workers** – where everyone feels a sense of belonging

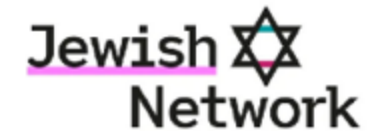


Underpinned by **People Leaders** who pride themselves on leading inclusively and safely. Supported by **People Networks** and allies who create safe spaces for people to be heard and contribute to an inclusive culture , with a wider focus on Activating Upstanders

# Our Inclusion Plan

	My role and how we work is flexible	I'm safe and respected at work	I'm treated fairly in hiring, performance and promotion processes	My work environment and tools are accessible and inclusive	My manager and our leaders are inclusive
Pillar	Flexible Working	Respectful & Psychological Safe Workplaces	Inclusive & Equitable Talent life cycle	Inclusive & Accessible Workplaces	Inclusive Leaders
Detail	<ul style="list-style-type: none"> <li>Inclusive policies tailored locally</li> <li>Job Design</li> <li>Leader upskilling, coaching and accountability</li> </ul>	<ul style="list-style-type: none"> <li>Prevention – raise awareness, activate bystanders, diverse teams</li> <li>Response – trauma informed approach to reporting options, investigations, discipline</li> </ul>	<ul style="list-style-type: none"> <li>Talent Attraction &amp; Acquisition</li> <li>Entry level programmes</li> <li>Mid-career programmes</li> <li>Performance, Development &amp; succession planning</li> <li>Offboarding</li> </ul>	<ul style="list-style-type: none"> <li>Workplace adjustments</li> <li>Accessible systems, work equipment and environment</li> </ul>	<ul style="list-style-type: none"> <li>Leading Inclusively &amp; Safely for senior leaders</li> <li>Leading Inclusively learning pathway reaching 11,000 People Managers</li> </ul>
Measure	<ul style="list-style-type: none"> <li>Your Say</li> <li>Number of part time and job share positions</li> <li>Men and women taking parental leave</li> <li>Pay Gap</li> </ul>	<ul style="list-style-type: none"> <li>Your Say</li> <li>Grievances</li> <li>Attrition</li> <li>Retention &amp; progression Pay Gap</li> </ul>	<ul style="list-style-type: none"> <li>Representation</li> <li>Attrition</li> <li>Your Say</li> <li>Progression</li> <li>Pay Gap</li> </ul>	<ul style="list-style-type: none"> <li>Your Say</li> <li>Grievances</li> <li>Attrition</li> <li>Pay Gap</li> </ul>	<ul style="list-style-type: none"> <li>Representation</li> <li>360 feedback</li> <li>Your Say</li> <li>Pay Gap</li> </ul>
Initiatives	<ul style="list-style-type: none"> <li>Inclusive family leave &amp; Carers leave</li> <li>Inclusive Health, online GP and specialist health services</li> <li>Flex in field &amp; frontline</li> <li>Hybrid Working</li> <li>Flex Bank Holidays</li> <li>Job share, part time</li> </ul>	<ul style="list-style-type: none"> <li>Spectrum of Conduct</li> <li>Activate Bystanders</li> <li>Allies / People Networks</li> <li>Comms campaigns</li> <li>Reporting/Investigations</li> </ul>	<ul style="list-style-type: none"> <li>Entry level ( including Career Returners)</li> <li>Talent sponsorship &amp; career planning</li> <li>Pay Equity Reviews</li> <li>Inclusion impact assessments</li> </ul>	<ul style="list-style-type: none"> <li>BT Passport</li> <li>Assisted Job Search</li> <li>Menopause Awareness and support</li> <li>Transition gender guidelines</li> <li>Accessible learning</li> <li>Accessible IT systems</li> </ul>	<ul style="list-style-type: none"> <li>Coaching to Leadership standards</li> <li>Leading inclusively – Standard</li> <li>Assessing leader capability</li> <li>Advocacy and role modelling</li> </ul>

# Our people networks are open to everyone





Q&A



# TABLE QUESTION

**What has intrigued or surprised you?**

and

**What are your next questions?**

# TABLE QUESTION

**What can you DO?**

# BREAK

Return at 12.00



# CREATING AN INCLUSIVE CULTURE



## About CRF



**ROSANNA NEARY**

Senior Client Partner, CRF

# BUILDING CAPABILITY ACROSS THE **HR** FUNCTION

**CRF** is a research-led learning network for HR leaders and their teams.

**CRF** builds capability in **HR** through a programme of evidence-based research, **technology-enabled learning** and **events** delivering **expert-led insight**, **development** and **peer exchange**.





Are you  
registered?



# Rethink Work

## Evolve or Endure

Epic Sana Lisboa Hotel  
Lisbon, Portugal



**Mon. 6 – Wed. 8**  
**October 2025**



# CREATING AN INCLUSIVE CULTURE

## Panel Discussion: Roles in Shaping Inclusive Culture

**DR. WANDA WALLACE**, Managing Partner, Leadership Forum Inc.

**LUCY FOWLES**, Sales Director, Forrester Research

**ANTHONY PICKERING**, Head of Business Development, RBC BlueBay Asset Management

**SUJATA BHATIA**, Chief Operating Officer, Monzo



# LUNCH

Return at 14.10



# CREATING AN INCLUSIVE CULTURE

## Case Studies: Unique HR Strategies that Drive Inclusion

**JONNY BRIGGS**

Diversity Equity Inclusion and  
Executive Search Director, **Aviva**

*and*

**JENN BARNETT**

Head of Inclusion and Diversity  
and ESG, **Grant Thornton**





# Diversity, Equity & Inclusion at Aviva



# Group DEI strategy

## Overarching ambition

*Aviva is an inclusive workplace where everyone feels that they belong. Our workforce reflects the communities we serve so we can deliver consistently for our customers.*

### Data, Governance & Accountability

#### Ambition

*One Aviva, leader-led DEI consistently embedded across functions and markets*

### People & Culture

#### Ambition

*An inclusive workplace where everyone can shine. We reflect our communities at all levels*

### Customer & Community

#### Ambition

*Aviva recognised as the most inclusive insurer, contributing to a more equitable society*

# Group approach & ambitions

## Representation targets:

41% Women in senior leadership

14.4% Ethnically diverse senior leadership  
15% A-E population

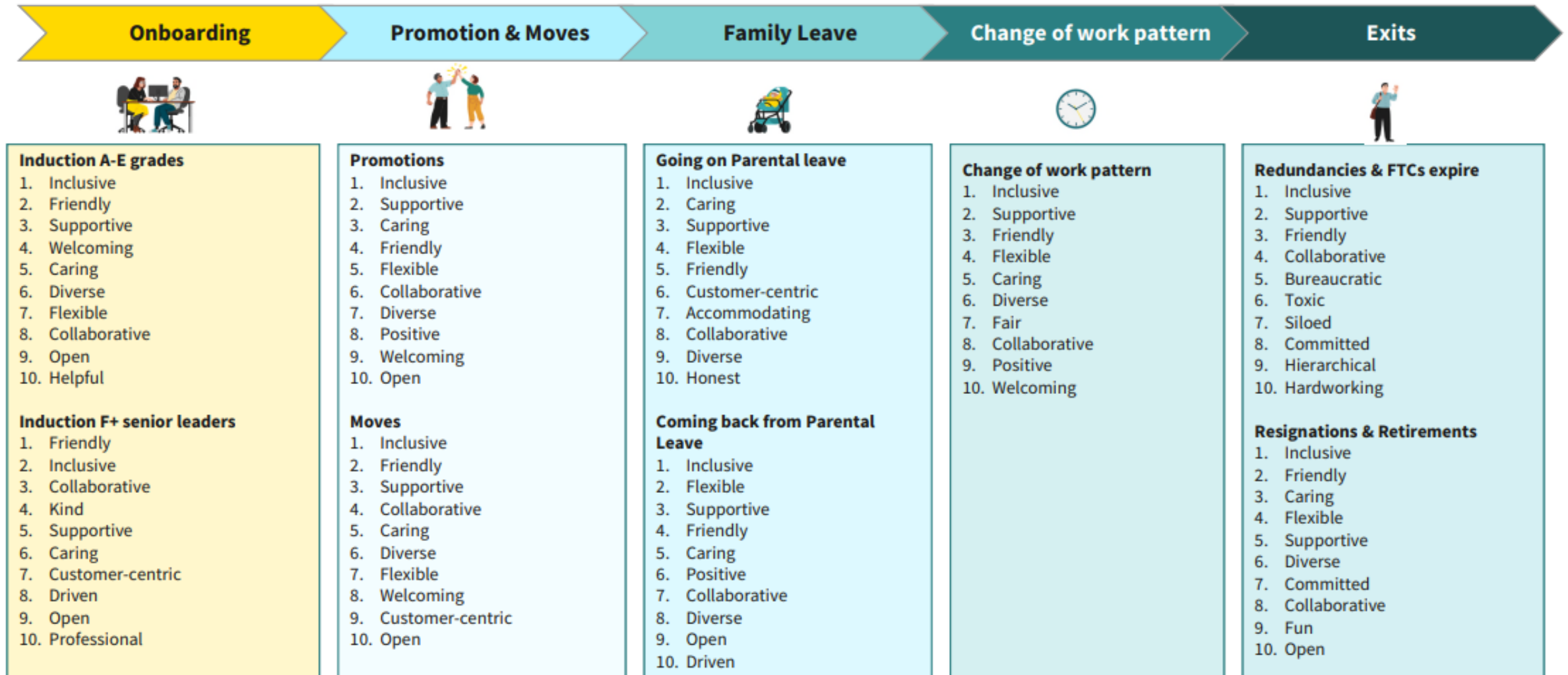
## Inclusion metrics:

Leadership effectiveness on DEI  $\geq 90\%$   
Psychological safety  $\geq 87\%$   
Belonging  $\geq 83\%$

## Demographic data - #thisisme

Age	Race/ethnicity
Caring responsibilities	Religion/faith
Disability	Sexual orientation
Gender identity	Socioeconomic background
Neurodiversity	Work pattern

# Top words colleagues use to describe our culture



\*3,207 colleagues shared their top three words to describe Aviva – this was free-text and colleagues did not have to choose from a set list of word. This data was taken from July 2023 – July 2024.

## Lessons Learn

- Group Executive Sponsorship
  - Pair up Exec's
  - Create competition
  - Accountability
- Group Executive Committee Meeting presentation
  - 10 mins / one a month
- Balanced co-chair and steerco
  - Set criteria?
  - Member of the community or parachute in
  - Electing or appointing co-chairs
- Clearly manage ambitions
- All communities are equal?
- Lobbyist / conscience or enforcer

# #thisisme



## 3 reasons to complete your workday data:

1

**We're asking for your help to make Aviva better - for your colleagues and for our customers.**

The better we understand our people, the better we can help everyone thrive at work. For example, more than 8,000 of you have now told us your ethnicity. Thanks to that, we now have the hard data to understand that Aviva is not yet properly representative of our society or our customers. And that means we could come up with an Ethnicity action plan to do something about it. We've set targets for more ethnically diverse senior leadership, are tracking pay and progression, and have the information we need to be held accountable for improvement.

2

**Please tell us about yourself - so we have a true, rounded picture of you and our workforce.**

We still have more to do. The Voice of Aviva survey told us that over 3000 colleagues have a disability, but that data is not showing up in Workday. Are they progressing in their careers as they'd like to? Are they leaving Aviva because we don't understand what support they need? We simply can't say. The same goes for our parents and carers and we still don't know enough about whether we are doing enough to attract people from more disadvantaged backgrounds. Without good data in the system, we can't see where we are letting ourselves down. We need to know so we can spot gaps and work towards improving them, understand whether our existing approaches work, and see what more we need to do.

3

**It only takes 2 minutes - and your information is secure.**

To do your bit to help everyone be themselves at work, please spend a few minutes completing your information in Workday. And you can rest assured that the information will be stored securely and only a small number of HR data bods will have access to it - your leader and their leader won't be able to see it. All your data is anonymised when we analyse it. It is never about identifying one person but about looking at trends and patterns across the business.

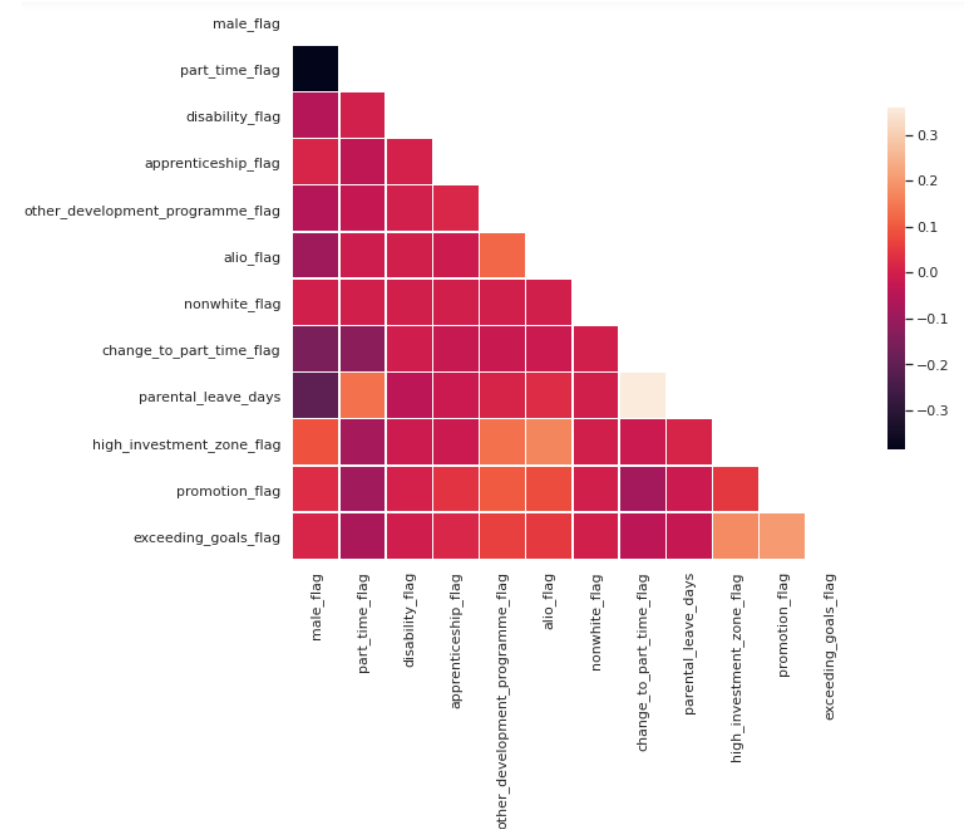


If we don't see it, we can't fix it, so please help us to **create a workplace that works for everyone.**

# Correlation Matrix

1. **Gender was not a significant predictor of whether people received promotions** – However, being female is highly correlated to the factors that do have a negative impact such as longer parental leave and part-time working.
2. **Part-time workers significantly disadvantaged for promotions** with Women making up 93% of that part-time workforce.
3. **Exceeding goals is positively correlated with promotions** – However, exceeding goals is also negatively correlated with part-time workers.
4. **Longer periods of parental leave had a more negative impact on career progression than shorter periods** – On average, women took 357 days compared to men who only took 158.
5. **Moving to the London office was highly correlated with promotions** – the number of men and women moving to London were equal between 2017 and 2021.

Correlation Matrix showing the relationship strength between variables



About this analysis

**This Machine Learning model has been built to consider individuals' characteristics and calculate the statistical relationship (i.e., correlation) with promotions.**

Data source: Aviva UK Workday and the Talent Solutions Team Alumni Excel Spreadsheet

# Your role

**Make it personal – talk to your team**

**Communicate how key decisions have been made with our colleagues in mind**

**Celebrate difference**

**Complete the 'Licence to Hire' training**

**When recruiting, challenge yourself and your leadership teams to explore the broadest talent pools for all roles**

**Join the Communities (via WorkVivo and email)**

**Come out as DEI-curious!**

**Be an active bystander**

**Use the Communities calendar**

**Be supportive**

**Recruiting – focus on capabilities and recruitment channels**

**Complete your #ThisIsMe diversity data on Workday**

**Use Voice of Aviva DEI data**

**Use/promote our 'DEI site'**

**Role model**

# CREATING AN INCLUSIVE CULTURE

## Case Studies: Unique HR Strategies that Drive Inclusion

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Diversity Equity Inclusion and  
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*and*

**JENN BARNETT**

Head of Inclusion and Diversity  
and ESG, **Grant Thornton**





# Grant Thornton case study

## Strategies that drive Inclusion



**Jenn Barnett (she/her)**

**May 2025**



# About us

We are a professional services firm and a partnership.

The UK member firm is part of a global network that employs 62,000 people in 140 countries provide assurance, tax, and advisory services



**27**  
UK offices



**200+**  
Partners



**6,000**  
UK employees



**£570m**  
Turnover



**6th**  
Largest auditor –  
FTSE 350



**No.1**  
Independent  
nominated adviser of  
AiM



**Flexible**



**93%**  
Feel included



**90%**  
Belong

# Inclusion Recognition in 2024

## Social Mobility

***3<sup>rd</sup> in the Social Mobility Employer's Index  
2024***

***Queen's Award for services to Social Mobility***

***Leap Award for Social Mobility***

## Awards

***We won 'Recruitment Programme of the  
Year' at the 2024 Social Mobility ('SOMO')  
Awards.***

***Flexible organisation of the Year Working  
Families***

***Bronze Award in the Disability Smart Awards***

## Other progress

**Gold Award and ranked 38th in the  
Stonewall Workplace Equality Index**

**Times Top 50 Employer for Equality**

**Top 10 for Working Families**

**Disability Confident Level 3 Employer**

# Why did Grant Thornton focus on Inclusion?

# The ED&I Business case – creating long term business impact



# Barriers that our diverse talent told us existed in the firm

01 Limited role models and senior level engagement

02 Invisible networks, lack of sponsorship and developmental feedback

03 Cultural barriers and lack of flexibility in work practices

04 Inconsistent work allocation and opportunity to progress

05 People from diverse backgrounds less likely to put themselves forward for promotions

06 People Management inconsistent – bias existed

## It's also about social value

- Children of people who work in Finance are 15x more likely to go into careers in finance
- Polish vs performance and confidence vs capability
- Creating social connections
- Earn less than colleagues from more financially privileged backgrounds with same qualifications
- Live in chaotic circumstances
- Suffer from imposter syndrome and 'fitting in'



# The approach that we took

# I&D principles

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All strands of diversity (seen and unseen) are equally important

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There will be a zero tolerance of deliberate bad behaviour

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We need to take deliberate steps to progress diverse talent

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Equitable action and education is needed to accelerate diverse talent

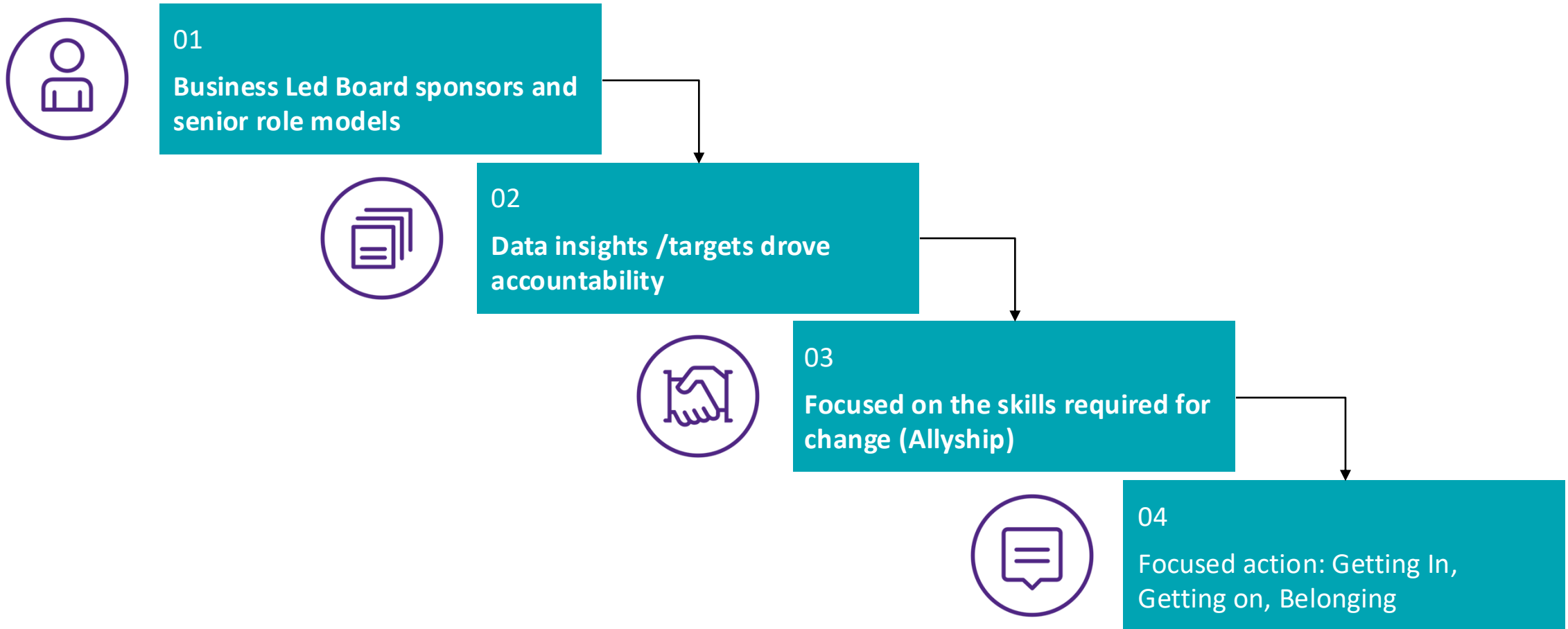
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All leaders will be held accountable for I&D

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Targets will be put in place to measure progress, but we will invest and provide support to get there

# The steps we took culturally to build inclusion



# Our Strategic Pillars



## Getting In

**Attraction** – Built on advocacy outreach to attract people from all diverse backgrounds to the firm

**Recruitment** –driven by data, accessible and fair

**Partnerships** in the external market – broader social reach



## Getting On

**Advocacy** –Sponsorship programme and dedicated coaches and development

**Progression** – The Outsider Experience, Within; Flexible Working

**Accountable Leaders and People Managers**



## Belonging

**Cultural Intelligence and Active Allyship**  
- Confident People managers supported by changed policy

**Community** –Working groups and Advisory Boards.

**Senior role models**, sharing stories,

# In practice - examples of Inclusion Interventions

Meeting  
contributions

Work  
Allocation

Transparent  
communication

Development  
feedback

Team support  
tasks

Shared out  
challenging  
assignments

Speak Up

Transparent  
performance  
management

CREATING AN INCLUSIVE CULTURE

## Reflections and Commitment



**DR. WANDA WALLACE**  
Managing Partner, Leadership Forum Inc.

# THANK YOU

Questions? Comments?

