

## KEY TAKEAWAYS

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### **Assess Your Organization**

Shape your DEI strategy by posing questions like: “Who are we?” “Who do we aspire to be?” “What do our employees and customers / patients think about our current DEI efforts?”

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### **Establish Guidelines for DEI Assessment Interviews**

Ensure clarity on interview objectives and how insights will be utilized to drive strategy and improvement, as well as confidentiality of discussions.

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### **Align DEI With Corporate Values**

Integrate DEI strategies with your organization's core values, mission, and business priorities to embed DEI as a fundamental aspect, rather than an isolated initiative.

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### **Secure Leadership Commitment**

Confirm commitment, and ensure messaging consistency in leadership's support across DEI and related initiatives, as their endorsement is essential to avoid failure.

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### **Create Advisory Boards**

Meet with representatives from targeted communities (key stakeholders, internal and external as appropriate) to build advocates, ensure engagement, and facilitate communication.

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### **Lead With Inclusion**

Integrate inclusive practices into all aspects of organizational policies, processes, and operations to ensure DEI efforts are consistently applied and effectively executed.

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### **Avoid Performative Actions**

Focus on developing and executing a comprehensive DEI strategy by establishing clear objectives and responsibilities for leaders, managers, and employees.

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### **Set Clear KPIs for DEI**

Focus on meaningful DEI actions with clear objectives and responsibilities for leaders, managers, and employees.

Develop sustainable initiatives aligned with measurable KPIs.



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### **Engage Your Board of Directors**

Involve board members in DEI discussions, and consider appointing DEI champions to lead deeper engagement and monitor progress at the governance level.

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### **Maintain Flexibility to Adjust DEI Strategy**

Recognize that DEI strategies must evolve and adapt to changing circumstances such as technology advancements, competitive landscapes, and socio-economic factors.