

ORGANIZATIONAL CULTURE



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Organizational Culture: Gehrett

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This set of resources was created to fill a need for course materials in the area of Organizational Culture, and designed for the Human Resources program at Western Technical College, La Crosse, WI.

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1: Generations and Belonging

Generations shape culture and belonging. Each one brings new ideas while holding onto traditions. Understanding these changes helps us see how we connect across time and what makes us feel at home in our communities.



Image Source: Lisa Everitt. [Inclusion and diversity benefit our entire society](#). Alberta Teachers Association.

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1.1: READ- Generation WHY?

Generation Why

Many of the foundational pillars of the HR profession are grounded in the principles of fairness and equitable treatment. These are laudable principles that over time have become increasingly more difficult to put into action as employee populations have become more diverse in many ways.

As a case in point, we now have five generations in the workplace. Interest in defining the generations—and how their views about work differ—started roughly three decades ago. There were the "radio babies" (sometimes referred to as the Silent Generation) who were born between 1928 and 1945. That was followed by Baby Boomers, who were born between 1946 and 1964. Then came Generation X, born between 1965 and 1979. During roughly the same time, "personnel" was shifting to "human resources," a change in nomenclature meant to capture how the function was maturing from a transactional approach to a propellant for strategy.

Shifting Expectations of Work

The focus on generations heightened the need to broadly understand employee populations by group. We learned that radio babies were typically motivated to work for the same company for their entire career, ending with a gold watch at their retirement party. If you came out of that era of the emerging middle class, single-employer stability meant everything.

Baby Boomers were generally more interested in upward mobility and had greater expectations of growing into increasingly more senior roles, with compensation to match. Succession planning and compensation planning became more formalized processes.

Generation X is widely regarded as the generation to bring to the forefront the idea of the workplace aligning with personal values, including diversity, work/life balance, flexibility and informality. This generation was the first technology natives, most having grown up with a personal computer and an internet connection. And unlike prior generations, Generation X was the least likely to grow their careers with one employer over time.

Fast-forward to today: We've added more generational categories (Millennials and Generation Z) and, as a byproduct, more complexity. Our world has grown more global and interconnected. And the social, political and legislative environments in the U.S. have become more fragmented, with the overturning of *Roe v. Wade* and the dismantling of affirmative action being just two recent examples.

My own story provides a case study in the shifting expectations of generations. I am an only child of immigrant, working-class, Baby Boomer parents. And though I don't precisely map to the profile of Generation X, many of the hallmarks are there. I didn't have a personal computer or internet connection in my home when I was growing up, but I went to schools with computer labs. Unlike my dad, who worked for the same employer until he retired at 53, The New York Times is my seventh employer. This wasn't by design. I simply followed my curiosities and interests and, over time, made choices that aligned with my values.

5 Lessons and Questions

From my lived experience, I've learned many things and have questions about many things:

1. **Job hopping and career mobility.** As a member of Generation X, the statistics say I will have between seven and eight employers over the span of my career. For the generation behind me, that number rises to anywhere between 10 and 14 unique employers. That's an average tenure of two to four years for each role. Those shifts, and that greater mobility, raise profound questions for HR about whether the assumptions that underpin our frameworks and policies are purpose-built for this moment. What does that mean for promotion tracks? For learning and development programs? How quickly can we train an employee, or are we better off hiring someone from outside the company who is already experienced?
2. **Succession planning.** We used to think about succession planning in 10-year increments. Now, we think about it in three- to five-year increments. With collapsing tenures, how do we choose our future leaders and develop them quickly for their next big roles?
3. **Compensation strategy.** Our compensation practices also have to be revisited. We have to re-examine how we think about issuing stock and vesting schedules if these are meant to be retention levers. If people aren't willing to work through our vesting schedules, what should be included in our compensation? Do we need different mixes for different

profiles, such as the mission loyalists who intend to stay put for the long haul versus mercenaries who want to tackle a project and be paid handsomely and quickly, preferably in cash? What could this do to the principle of equity?

4. **Rethinking retirement.** Some organizations still have mandatory retirement ages for certain roles, and yet, the current occupant of the highest office in the land is an octogenarian. Global life expectancy is just north of 73 years old and has been on an upward trend of .25 percent since 2019. People—out of necessity, desire or both—are working longer. How do we best leverage their skills and institutional knowledge without compromising career mobility for younger workers? Maybe we need an approach that creates a kind of glide path to retirement. Maybe at a certain age, you can qualify for part-time status. You still get benefits. We reduce your salary. Some portion of your work now becomes mentoring peers. People are living longer, healthier lives, and they want to keep contributing.
5. **Skills-based hiring.** There's been a shift to reframe skill requirements, which, while a long time coming, does have its challenges. For example, what do you do with those employees who are very good at just one skill when you need generalists to help navigate all the uncertainty and new challenges that companies are facing? Are we over-rotating on skills-based hiring? We need to think about where that pendulum should settle. I firmly believe we need to explore these questions and act on them to keep our function relevant and useful.

Drawing Clear Boundaries

At a time when so much is changing, we also need to be clear about what is not changing and what shouldn't change. Many younger workers come into organizations wanting their employers to represent what they believe in and stand for. That's a slippery slope at best. What a 22-year-old believes today is likely going to change over time.

Companies have a responsibility to say, "We are timeless in that these are our values. This is our approach to business. We'll evolve where it makes sense, but it won't be because of the loudest small group who are demanding that we care about a particular issue."

Everybody wants you to stand behind something. Companies need to say to employees that they are free to have their personal passions and beliefs and values, but there are boundaries. You have to draw lines somewhere, because people who are passionate aren't necessarily going to draw boundaries around themselves.

It all comes back to this question: What is the role of the enterprise today? During the era of radio babies, it was easier. Companies existed to make money and help create a middle class. Even the advertising jingles were simple—"We bring good things to life." But now people will press you for specifics. "What good things? And how are you bringing them to life? Are you operating in countries that don't value human rights?"

One of the many roles of HR is to work with senior leaders to define the "immutables" of your organization. And there can't be too many. Companies have to define those. And if they have already, they need to make sure they are more vocal about sharing them. There are going to be some people who opt in, and there are going to be some people who say, "This has nothing to do with me. I'm leaving," and that might be some of your star people. That prospect can make organizations uncomfortable. In the minds of some, it may winnow your options in terms of hiring talent. But if culture is as important as we all say it is, then you should embrace that.

Source

- Jacqueline M. Welch, "Generation Why", SHRM.org, February 24, 2024

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1.2: WATCH- Preventing Generational Stereotypes at Work

In this week's episode of The Training Minute, we'll explore strategies for cultivating a work environment that is free from generational stereotypes. By minimizing preconceptions based on age, we can foster a more inclusive and collaborative workplace that benefits all employees.



Source: "[Preventing generational stereotypes at work](#)", The Training Minute.

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1.3: WATCH- Bridging the Generational Gap in the Workplace

As we strive to write and create into the future, our ability to understand the behavior patterns of each generation and the underlying value system will allow us to create awareness of where we need to adapt to pave the way for the next generation of leaders.



Source: "[Bridging the generational gap in the workplace](#)" | Mitch Lomazov | TEDxBradenton

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1.4: WATCH- The Challenge With Gen Z

Some of the human skills that are under-appreciated and under-trained in this age are: How to have difficult conversation, how to have an effective confrontation, and how to give and receive feedback.



Source: "[The Challenge with Gen Z](#)" | Simon Sinek

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1.5: WATCH- 5 Generations in the Workplace

Dr. Jeremy Graves discusses how having five generations in the workplace right now affects how different people from different generations show up to work.



Source: "[Five Generations in the Workplace](#)", The Complete Leader.

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2: Fostering an Inclusive Organizational Culture

An inclusive organizational culture values diversity and ensures everyone feels respected and heard. It fosters collaboration, innovation, and a sense of belonging, where different perspectives strengthen the community. By embracing inclusion, organizations create spaces where people thrive and contribute their best work.



Image Source: Abed Baidas, "[DEI and Future Leadership](#)", Talents of Endearment.

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2.1: WATCH- What is DEI?

DEI is short for diversity, equity, and inclusion. But what really is DEI and why is it necessary?



Source: "[Cheat Sheet: What is DEI?](#)", The Root.

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2.2: WATCH- What DEI Gets Wrong - and How to Do It Right

Social entrepreneur Paolo Gaudiano explains why many companies are taking the wrong approach to diversity, equity and inclusion (DEI) initiatives — by overly focusing on one thing. To avoid backlash and costly turnover, he shows the key change leaders can make to create thriving, equitable workplaces while also increasing profits.



Source: "[What DEI Gets Wrong — and How to Do It Right](#)" | Paolo Gaudiano | TED

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2.3: READ- Diversity and Multiculturalism

Diversity and Multiculturalism

Hiring Multicultural

On a Tuesday afternoon, as you are getting ready to go to lunch, you receive an e-mail from your human resources (HR) manager about the need to hire a new project manager, and there is a \$500 bonus for referring a friend who successfully joins the company. Immediately, you e-mail your friend Daniel, because you know he would be great for the job. Daniel is eventually hired for the position, and a few months later a new e-mail goes out asking for friend recommendations for a new position. You and Daniel both recommend someone, and eventually that person gets hired. Over the next year, hiring notices are not advertised externally as the organization has had good luck with this hiring practice. Seems like a great way to recruit new people, doesn't it? It can be, but it also can be a detriment to the diversity and multiculturalism of the workplace. How, you might wonder?

While not true across the board, people have a tendency to spend time with people who are like themselves, in race, income level, and other aspects of diversity such as sexual orientation. In fact, according to the National Institute of Child Health and Human Development and a study published in the *American Journal of Sociology*, it is much more likely that someone will name a person in their own race as a friend than someone of a different race. James Moody, "Race, School Integration, and Friendship Segregation in America," *American Journal of Sociology* 107, no. 3 (2001): 679–719. Likewise, even from a young age, people tend to choose friends who are of the same race. As a result, when you recommend Daniel for a position, it is highly likely that Daniel is similar, from a diversity perspective, to you. Then, when Daniel recommends someone for a job, it is highly likely that he, too, is recommending someone with similar characteristics as you both. This obviously creates a lack of multicultural diversity in the workplace, which can mean lost profits for companies.

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2.3.1: Diversity and Multiculturalism

Learning Objectives

1. Define, explain, and identify your own power and privilege.
2. Provide reasoning as to why diversity is important to maintain profitability.

Many people use the terms *diversity* and *multiculturalism* interchangeably, when in fact, there are major differences between the two. **Diversity** is defined as the differences between people. These differences can include race, gender, sexual orientation, religion, background, socioeconomic status, and much more. Diversity, when talking about it from the human resource management (HRM) perspective, tends to focus more on a set of policies to meet compliance standards. The Equal Employment Opportunity Commission (EEOC) oversees complaints in this area. We discuss the EEOC in [Section 3.3.1 "Equal Employment Opportunity Commission \(EEOC\)"](#) and in greater detail in Chapter 4 and Chapter 5.

Multiculturalism goes deeper than diversity by focusing on inclusiveness, understanding, and respect, and also by looking at unequal power in society. In a report called “The 2007 State of Workplace Diversity Management Report,” Society for Human Resource Management, *The 2007 State of Workplace Diversity Management Report*, March 2008, most HR managers said that diversity in the workplace is

1. not well defined or understood at work,
2. focuses too much on compliance, and
3. places too much emphasis on gender and ethnicity.

This chapter focuses on the advantages of a diverse workplace and discusses multiculturalism at work and the compliance aspect of diversity.

Power and Privilege

As defined in this chapter, diversity focuses on the “otherness” or differences between individuals and has a goal of making sure, through policies, that everyone is treated the same. While this is the legal and the right thing to do, multiculturalism looks at a system of advantages based on race, gender, and sexual orientation called **power and privilege**. In this system, the advantages are based on a system in which one race, gender, and sexual orientation is predominant in setting societal rules and norms.

The interesting thing about power and privilege is that if you have it, you may not initially recognize it, which is why we can call it invisible privilege. Here are some examples:

1. **Race privilege.** Let’s say you (a Caucasian) and your friend (an African American) are having dinner together, and when the bill comes, the server gives the check to you. While this may not seem like a big issue, it assumes you (being Caucasian) are the person paying for the meal. This type of invisible privilege may not seem to matter if you have that privilege, but if you don’t, it can be infuriating.
2. **Social class privilege.** When Hurricane Katrina hit New Orleans in 2005, many people from outside the storm area wondered why so many people stayed in the city, not even thinking about the fact that some people couldn’t afford the gas to put in their car to leave the city.
3. **Gender privilege.** This refers to privileges one gender has over another—for example, the assumption that a female will change her name to her husband’s when they get married.
4. **Sexual orientation privilege.** If I am heterosexual, I can put a picture of my partner on my desk without worrying about what others think. I can talk about our vacations together or experiences we’ve had without worrying what someone might think about my relationship. This is not the case for many gay, lesbian, and transgendered people and their partners.

Oftentimes the privilege we have is considered invisible, because it can be hard to recognize one’s own privilege based on race, gender, or social class. Many people utilize the color-blind approach, which says, “I treat everyone the same” or “I don’t see people’s skin color.” In this case, the person is showing invisible privilege and thus ignoring the privileges he or she receives because of race, gender, or social class. While it appears this approach would value all people equally, it doesn’t, because people’s different needs, assets, and perspectives are disregarded by not acknowledging differences. Victoria C. Plaut, Kecia M. Thomas, and Matt J. Goren, “Is Multiculturalism or Color Blindness Better for Minorities?” *Psychological Science* 20, no. 4 (2009): 444–46.

Another important aspect of power and privilege is the fact that we may have privilege in one area and not another. For example, I am a Caucasian female, which certainly gives me race privilege but not gender privilege. Important to note here is that the idea of power and privilege is not about “white male bashing” but understanding our own stereotypes and systems of advantage so we can be more inclusive with our coworkers, employees, and managers.

So what does this all mean in relation to HRM? It means we can combine the understanding of certain systems that allow for power and privilege, and by understanding we may be able to eliminate or at least minimize these issues. Besides this, one of the best things we can do for our organizations is to have a diverse workforce, with people from a variety of perspectives. This diversity leads to profitability and the ability to better serve customers. We discuss the advantages of diversity in [Section 3.1.2 "Why Diversity and Multiculturalism?"](#).

Human Resource Recall

Take this week to examine your own power and privilege as a result of gender, race, or social class. Notice how people treat you because of your skin color, gender, or how you dress and talk.

Why Diversity and Multiculturalism?

When many people look at diversity and multiculturalism, they think that someone’s gender, skin color, or social class shouldn’t matter. So diversity can help us with policies to prevent discrimination, while multiculturalism can help us gain a deeper understanding of the differences between people. Hopefully, over time, rather than look at diversity as attaining numerical goals or complying with the law, we can combine the concepts to create better workplaces. Although many books discuss laws relating to diversity, not many actually describe why diversity is necessary in the workplace. Here are a few main reasons:

1. It is the law.
2. We can better serve customers by offering a broader range of services, such as being able to speak a variety of languages and understanding other cultures.
3. We can better communicate with one another (saving time and money) and customers.
4. With a multicultural perspective, we can create better ideas and solutions.

Fortune 500 Focus

Hilton is one of the most recognized names in the hotel industry. Hilton employs 130,000 people in 3,750 hotels in 84 countries. The hotel chain, with some locations franchised, focuses on diversity and inclusion as part of its operations. First, it has a director of global diversity and inclusion, who plays a key role in executing the Hilton global diversity and inclusion efforts, which are focused on culture, talent, workplace, and marketplace diversity strategies. Each Hilton brand must establish its own diversity performance goals and initiatives, which are monitored by the diversity council. The diversity council is made up of the company board of directors, the CEO, and vice president of human resources. At any given time, Hilton has thirty or more diversity initiatives in place (Forsythe).

Hilton has created several diversity programs within the communities in which the hotels operate. For example, Hilton was one of the first hotel chains to develop an outreach program to educate minority and female entrepreneurs for franchise investments. One part of the program includes invitation-only seminars that discuss what it takes to be a successful hotel owner. Hilton says its diversity seminars are driven by the fact that it wants employees to reflect the diversity of the customers.

In addition to the outreach program, Hilton partners with historically black colleges and universities for recruiting, which creates an effective tie to jobs once students graduate. It has developed a supplier tracking system, so it knows the total number of supplier payments made and how many of those suppliers are female or minorities. William A. Holland, the vice president for workforce planning and analysis says, “It takes leadership to make diversity work, and our diversity initiative comes from the highest levels of our organization. (Forsythe).

Promoting a multicultural work environment isn’t just the law. Through a diverse work environment and multicultural understanding, organizations can attain greater profitability. A study by Cedric Herring called *Does Diversity Pay?* reveals that diversity does, in fact, pay. The study found those businesses with greater racial diversity reported higher sales revenues, more customers, larger market shares, and greater relative profits than those with more homogeneous workforces.

Other research on the topic by Scott Page found that people from varied backgrounds are more effective at working together than those who are from similar backgrounds, because they offer different approaches and perspectives in the development of solutions. Often people believe that diversity is about checking a box or only providing window dressing to gain more customers, but this isn't the case. As put by Eric Foss, chairperson and CEO of Pepsi Beverages Company, "It's not a fad. It's not an idea of the month. It's central and it's linked very directly to business strategy."

A study by the late Roy Adler of Pepperdine University shows similar results. His 19-year study of 215 *Fortune* 500 companies shows a strong correlation between female executives and high profitability.

Another study, conducted by Project Equality, found that companies that rated low on equal opportunity issues earned 7.9 percent profit, while those who rated highest with more equal opportunities resulted in 18.3 percent profit (Lauber). These numbers show that diversity and multiculturalism certainly is not a fad, but a way of doing business that better serves customers and results in higher profits.

As managers, we need to recognize this and develop policies that recognize not only the importance of diversity but the importance of nurturing multicultural understanding in the workplace. Many employees, however, may be resistant to a discussion on diversity and multiculturalism. Much of this may have to do with their own power and privilege, but some resistance may be related to the discomfort people may feel when faced with the realization that change is a necessity and the cultural makeup of the workplace is changing. Some people may feel "We've always done it this way" and are less willing to change to the new ways of doing things.

Perhaps one of the best diversity statements by a *Fortune* 500 company was made by Jose Manuel Souto, the CFO for Visa in Latin America. He says, "A diverse workforce is critical to providing the best service to our global clients, supporting our business initiatives, and creating a workplace environment that promotes respect and fairness."

Now that you have an understanding of the meaning of diversity, power, and privilege, as well as the importance of diversity, we will discuss specific diversity strategies in [Section 3.2](#).

Key Takeaways

- *Diversity* is the real or perceived differences between individuals. This can include race, gender, sexual orientation, size, cultural background, and much more.
- *Multiculturalism* is a term that is similar to diversity, but it focuses on development of a greater understanding of how power in society can be unequal due to race, gender, sexual orientation, power, and privilege.
- *Power and privilege* is a system of advantages based on one's race, gender, and sexual orientation. This system can often be invisible (to those who have it), which results in one race or gender having unequal power in the workplace. Of course, this unequal power results in unfairness, which may be of legal concern.
- *Diversity* is important to the success of organizations. Many studies have shown a direct link between the amount of diversity in a workplace and the company's success.

Exercises

1. Perform an Internet search to find a specific diversity policy for an organization. What is the policy? From what you know of the organization, do you believe they follow this policy in reality?

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2.3.2: Diversity Plans

Learning Objectives

1. Be able to apply strategies to create a multicultural work environment and diversity plans.
2. Be able to create an HR plan with diversity considerations.

While state and federal laws must be followed to ensure multiculturalism, the culture of the company and the way the organization operates can contribute to the nurturing of a multicultural environment (or not). Most companies have a formalized and written anti-discrimination and harassment policy. For example, Zappos's policy states, "The diversity of Zappos' employees is a tremendous asset. We are firmly committed to providing equal opportunity in all aspects of employment and will not tolerate any illegal discrimination or harassment. Examples of such behavior include derogatory comments based on racial or ethnic characteristics and unwelcome sexual advances. Please refer to the applicable sections of the Employee Handbook for further guidance." Zappos.com, accessed August 25, 2011.

Implementing a policy is an excellent first step, but what is important is how the company acts on those formalized processes and written policies. Let's say, for example, an organization has a published policy on inclusion of those with physical disabilities, but much "schmoozing" and relationship development with managers takes place on the golf course on Friday afternoons. While the policy states the company doesn't discriminate, their actions and "traditions" show otherwise and do discriminate against those with disabilities. If this is where the informal work and relationship building take place, an entire group could be left out of this process, likely resulting in lower pay and promotion rates. Likewise, organizations that have a "beer Friday" environment may discriminate against those whose religions do not condone drinking alcohol. While none of these situations are examples of blatant discrimination, a company's culture can contribute to an environment that is exclusive rather than inclusive.

Many organizations have developed diversity management plans that are tied to the written diversity policy of the organization. In fact, in many larger organizations, such as Hilton, manager- or director-level positions have been created to specifically manage diversity plans and programs. Josh Greenberg, a researcher in the area of workplace diversity, contends that organizations with specific diversity plans tend to be able to facilitate changes more quickly than companies without diversity plans. Josh Greenberg, "Diversity in the Workplace: Benefits, Challenges, Solutions," *The Multicultural Advantage*, 2004, accessed July 12, 2011. He says there are three main steps to creating diversity plans:

1. **Assessment of diversity.** Employee satisfaction surveys, discussions, and open forums that can provide insight into the challenges and obstacles to diversity. Inclusion of all workers for input is necessary to create a useful plan.
2. **Development of the diversity plan.** Based on step 1, a series of attainable and measurable goals should be developed regarding workplace diversity.
3. **Implementation of the plan.** The commitment of executives and management is necessary. Formulating action plans based on the goals developed in step 2 and assignment of implementation and measurement of those plans must follow. The action plan should be the responsibility of the entire organization, not just the director of diversity or human resources.

In [Section 3.2.1 "Recruitment and Selection"](#), we discuss some of the HR plan considerations in company culture and "our way of doing things" that are worth considering when creating a diversity plan.

Recruitment and Selection

As you saw in the opening of Chapter 3, sometimes organizations do not mean to be exclusive or discriminatory, but their practices are discriminatory and illegal. For example, the Equal Employment Opportunity Commission (EEOC) says it is illegal to publish a job advertisement that shows a preference for a particular type of person or discourages someone from applying for a job. For example, a Facebook post that says "recent college graduates wanted" might be inclusive to a younger group and discouraging to a diverse (older) workforce, not making the post multicultural. Another example might be the reliance on word-of-mouth advertisement for job openings. Suppose you have a mostly Hispanic workforce and use word of mouth for recruitment. It is likely that most new hires will also be Hispanic. This is also illegal, but perhaps a consideration is the lack of diversity you will have in your workplace with these recruitment methods.

Make sure that job announcements aren't posted only for your Facebook friends to see; post them in a variety of places to gain the largest and most diverse response.

We address discrimination in the selection process in Chapter 5. However, a mention of the four-fifths rule here is important to determine how we can quantitatively evaluate discrimination in our selection practices. One way to calculate possible discrimination is by using the **four-fifths rule**, or 80 percent rule. The rule states that a selection rate for any race, sex, or ethnic group that is less than four-fifths of the rate for the group with the highest rate could be regarded as adverse impact. **Adverse impact** refers to employment practices that may appear to be neutral but have a discriminatory effect on a protected group. For example, let's assume 100 women and 500 men applied to be firefighters. Let's say 20 of those women were hired and 250 men were hired. To determine adverse impact based on the four-fifths rule, calculate the following:

- Selection rate for women: 20 percent
- Selection rate for men: 50 percent
- Then divide the highest selection rate: $.20/.50 = .4$

Because .4, or 40 percent, is less than four-fifths, there may be adverse impact in the selection process for firefighters.

Testing

If employment tests are required, a test must be in direct relation to the job. For example, an organization that uses a personality test in hiring must be able to show that the personality test results are nondiscriminatory and do not exclude a population.

In addition, if a reasonable accommodation is needed, such as an interpreter, and it does not cause financial difficulty for the organization, this should be granted.

Also consider the type of test and how it might exclude a certain group of people, such as those who don't speak English as a first language. We will discuss multiculturalism and testing further in Chapter 5.

Pay and Promotion

Development of policies related to pay and promotion is key to fairness in a multicultural situation. It is widely published that women make about 77 percent of what men earn for similar jobs. National Committee on Pay Equity, accessed August 25, 2011. Many studies have tried to determine a cause for this pay inequity, and here are some of the possible reasons studied and researched:

1. **Hours worked.** Studies have said that women tend to work fewer hours because of child-care and housework expectations.
2. **Occupational choice.** A study performed by Anne York at Meredith College. Anne York, "Gender Differences in the College and Career Aspirations of High School Valedictorians," *Journal of Advanced Academics* 19, no. 4 (Summer 2008): 578–600 found that women tend to choose careers that pay less because they are worried about balancing family and career. In addition, numerous studies show that women choose careers on the basis of gender stereotypes (e.g., nurse, teacher) and that this leads to lower pay.
3. **Stereotypes.** The concept of male bias is a possibility. In many studies, people were more likely to choose male doctors over female doctors, even when experience and education were the same. David R. Hekman, Karl Aquino and Brad P. Owens, "An Examination of Whether and How Racial and Gender Biases Influence Customer Satisfaction," *Academy of Management Journal* 53, no. 2 (April 2010): 238–264. There appears to be a perception that men may be more competent in certain types of jobs.
4. **Maternity and family leave.** Women leaving the workforce for a short or extended period of time may affect the perception of promotability in the workplace.
5. **Salary negotiation.** A study performed by Bowles and Babcock Hannah Riley Bowles and Linda Babcock, "When Doesn't It Hurt Her to Ask? Framing and Justification Reduce the Social Risks of Initiating Compensation" (paper presented at IACM 21st Annual Conference, December 14, 2008): accessed August 25, 2011. showed that men were eight times more likely to negotiate salary than women. In addition, when women did negotiate, they received lower monetary returns. Consider a study performed by Cornell University, which found that women were often negatively affected in their job when they negotiated salary, as compared to men not being viewed negatively after negotiations.

Whatever the reason for pay difference, all managers should be aware of these differences when hiring and promoting. Allowing managers to determine the pay for their employees can also bring out negative stereotypes—and lead to breaking of the law. Determining a set pay schedule for all new and promoted employees can help remedy this situation.

A factor in promotions can also be the mentor-mentee relationship. Most individuals in organizations will have an informal mentor who helps them “through the ranks.” Traditionally, this informal mentor relationship results in someone “pairing up” with another who has similar physical characteristics, is the same gender, or has a similar mind-set. As a result, if the organization has, for example, mostly men, it is likely the female will not be informally mentored, which can result in lack of promotion. Likewise, if the workforce consists of mostly Caucasian females, it is likely the African American male may not develop an informal mentor relationship with his female counterparts. Development of a formal mentorship program to ensure that everyone has a mentor is one way to alleviate this situation. Mentorship programs are discussed in Chapter 8.

Now What?

Now that you have an awareness of the aspects of HR that could be affected by multiculturalism, you may consider what steps you can take to create a more multicultural workplace. The first step would be to create a diversity plan, as discussed earlier in this section. The second step would be to look at the operation of the HR department and to figure out what departmental measures can be taken to promote diversity.

HR, for example, can provide a training series on power and privilege and how it relates to the workplace. Awareness is the first step to creating a truly multicultural environment. Once employees recognize their own power and privilege, the training could be developed to include laws related to diversity, and discussions on bias can take place. Then discussions can be held on how to improve HR plans such as job analysis, recruitment, and selection to create a multicultural work environment. Rather than thinking about this training as one of many objectives that must be accomplished, think about the training from the conversation perspective. Getting the conversation started is the first step in this personal and professional development process for employees.

Some of the aspects to creating a training focused on multiculturalism might include the following:

1. Build a cultural knowledge about customs, religions, and histories.
2. Discuss treatment of people based on them as individuals, rather than as part of a “group,” which can result in stereotyping.
3. Teach employees to listen actively, which can help raise cultural awareness.
4. Train employees to rethink current policies and how those policies might be exclusive to a certain group.
5. Work on resistance to change. Many employees think, “This is the way we have always done it, and now we have to change it because we have a group of ____ working here now.”
6. Does your leadership team have a multiculturalism perspective? Are many ethnic backgrounds and other multicultural traits represented?

While these suggestions may not eliminate power and privilege, the ability to talk about differences and expectations can be a key ingredient to creating a more inclusive environment. Sometimes this type of training can help people evaluate their perceptions. For example, suppose a complaint came through that a woman was making derogatory sexual comments to only one group of men in an organization. When talked to about it, she said she made comments to the “techies” because she thought the comments would provide them a needed confidence boost, but she generally wouldn’t make those types of comments. This is an example of her perception (“techies” need confidence boosts from women) followed by her action (the comments) on this perception. When we assume our perceptions are correct, we are usually wrong. Training can get people to consider their emotions, stereotypes, and expectations. Besides training, asking ourselves a series of important questions can be the start to making diversity and multiculturalism work. The University of California, San Francisco human resource department lists some of these questions, which are shown in the sidebar.

Things to Consider When Creating a Multicultural and Diverse Work Environment

- Do you test your assumptions before acting on them?
- Do you believe there is only one right way of doing things, or that there are a number of valid ways that accomplish the same goal? Do you convey that to staff?
- Do you have honest relationships with each staff member you supervise? Are you comfortable with each of them? Do you know what motivates them, what their goals are, and how they like to be recognized?
- Are you able to give negative feedback to someone who is culturally different from you?
- When you have open positions, do you insist on a diverse screening committee and make additional outreach efforts to ensure that a diverse pool of candidates has applied?

- When you hire a new employee, do you not only explain job responsibilities and expectations clearly but orient the person to the campus and department culture and unwritten rules?
- Do you rigorously examine your unit's existing policies, practices, and procedures to ensure that they do not differentially impact different groups? When they do, do you change them?
- Are you willing to listen to constructive feedback from your staff about ways to improve the work environment? Do you implement staff suggestions and acknowledge their contribution?
- Do you take immediate action with people you supervise when they behave in ways that show disrespect for others in the workplace, such as inappropriate jokes and offensive terms?
- Do you make good faith efforts to meet your affirmative action goals?
- Do you have a good understanding of institutional isms such as racism and sexism and how they manifest themselves in the workplace?
- Do you ensure that assignments and opportunities for advancement are accessible to everyone?
- What policies, practices, and ways of thinking have differential impact on different groups?
- What organizational changes should be made to meet the needs of a diverse workforce?

Source: University of California, San Francisco, "Managing Diversity in the Workplace," chap. 12 in *Guide to Managing Human Resources*, accessed July 11, 2011.

Human Resource Recall

Why is multiculturalism important in the workplace? What is your role, as an employee in your organization, to ensure a diverse workforce?

How Would You Handle This?

Refer a Friend

Your manager is very concerned about the cost of hiring the three new people you need. As a result, she doesn't want to post the advertisement in a variety of places; she thinks it's best to just use a "refer a friend" recruitment strategy. When she moves forward with this strategy, ten people turn in résumés. Upon looking further, it appears all applicants went to the same private religious college and graduated around the same time. You are concerned that this method of recruitment lacks diversity. How would you handle this with your manager?

How Would You Handle This?

Key Takeaways

- Oftentimes there are cultural aspects to an organization that make it resistant to an inclusive environment. These are often not obvious, but it is important to be aware of how your own company culture impacts multiculturalism.
 - One way to begin the discussion within your organization is to create diversity action plans, for which the entire company is responsible and for which HR is the change agent. In addition to company wide initiatives, HR can also look within its own HR plans to see where it may be able to change.
 - In recruitment, awareness of how and where you post announcements is crucial.
 - Testing should be fair and unbiased and shouldn't negatively impact someone based on race, national origin, gender, social class, or educational level.
 - There are many reasons for differences in pay. Development of a set pay scale can alleviate some of the issues surrounding unfair pay, especially between men and women.
 - Formal mentorship programs can create multicultural understanding and can ensure people do not stick with their own race or gender when helping someone move up the ranks in an organization.

Exercises

1. What are some things we can do, personally, to be more multi-culturally efficient?
2. What are the advantages of having a set pay scale? What are the disadvantages?

Source: "Human Resource Management: Diversity and Multiculturalism", Saylor Academy, 2012.

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2.3.3: Multiculturalism and the Law

Learning Objectives

1. Define the role of the Equal Employment Opportunity Commission (EEOC).
2. Explain the various types of laws covered by the EEOC.

As we already know, it is in an organization's best interest to hire and promote a multicultural and diverse workforce. Sometimes though, people are still discriminated against at work. As a result, a federal agency has been established to ensure employees have a place to file complaints should they feel discriminated against. This is the topic of [Section 3.1](#). However, please note that each of these topics is discussed in Chapter 4 as well, but they are also worth mentioning here.

Equal Employment Opportunity Commission (EEOC)

The **Equal Employment Opportunity Commission (EEOC)** is a federal agency charged with the task of enforcing federal employment discrimination laws. The laws include those that protect people from discrimination in all areas of employment, such as discrimination based on race, color, religion, sex, national origin, age, and disability. People who have filed a discrimination charge are also protected against discrimination under the EEOC. Employers with at least fifteen employees (twenty for age discrimination) are covered under the EEOC. This agency covers not only discrimination in hiring but also discrimination in all types of work situations such as firing, promotions, harassment, training, wages, and benefits. The EEOC has the authority to investigate charges of discrimination against employers. The agency investigates the claims, makes a finding, and then tries to settle the charge. If they are unsuccessful in settling the charge, the EEOC has the right to file a lawsuit on behalf of the complainants. The EEOC has headquarters in Washington, DC, with fifty-three field offices throughout the United States.

If a company has more than one hundred employees, a form called the EEO-1 must be filled out yearly. This form confirms the demographics of an organization based on different job categories. Equal Opportunity Employment Commission, *2011 EEO-1 Survey*, accessed December 20, 2010. An organization that employs more than fifty people and works for the federal government must also file an EEO-1 yearly, with the deadline normally in September. In addition, organizations must post the EEOC notice, which you have probably seen before, perhaps in the company break room. Finally, organizations should keep on file records such as hiring statistics in the event of an EEOC investigation.

It is necessary to mention here that while there is a legal compliance concern, as discussed before, it is in the company's best interest to hire a diverse workforce. So while we can discuss the legal aspects, remember that the purpose of having a diverse workforce is not just to meet EEOC requirements but to create a better, more profitable workplace that better serves customers.

Table 3.1 How the EEOC Process Works and Requirements for Employers

Requirements by EEOC
Post Federal and State EEOC notices
File yearly report called EEO-1
Keep copies of documents on file
Process for Investigation
1. The EEOC complaint is filed.
2. The EEOC notifies the organization of the charges.
3. The EEOC acts as a mediator between the employee and the employer to find a solution.
4. If step 3 is unsuccessful, the EEOC will initiate an investigation.
5. The EEOC makes a determination, and then the employer has the option of remedying the situation or face a potential lawsuit.

EEOC Federal Legislation

While the EEOC is the larger governing body, many pieces of legislation relating to multicultural practices are part of the EEOC family of laws. Many of these laws began with **Title VII of the Civil Rights Act** in 1964. This act, enforced by the EEOC, covers several areas in which discrimination was rampant. However, a **bona fide occupational qualification (BFOQ)** is a quality or attribute employers are allowed to consider when making decisions during the selection process. Examples of BFOQs are a maximum age limit for airline pilots for safety reasons and a Christian college's requirement that the president of the college be Christian.

EEOC laws relate specifically to the following and are discussed in detail in Chapter 4 and Chapter 5:

1. Age
2. Disability
3. Equal pay
4. Genetic information
5. National origin
6. Pregnancy
7. Race/color
8. Religion
9. Retaliation
10. Sex
11. Sexual harassment

Age

Age discrimination involves treating someone less favorably because of his or her age. Created in 1967, the **Age Discrimination in Employment Act (ADEA)** is enforced by the EEOC. This law covers people who are age forty or older. It does not cover favoring an older worker over a younger worker, if the older worker is forty years or older. The law covers any aspect of employment such as hiring, firing, pay, job assignments, promotions, layoffs, training, fringe benefits, and any other condition or term of employment.

The law also goes deeper by forbidding harassment of someone based on age. While simple teasing or offhand comments are not covered, more serious offensive remarks about age are covered by this EEOC law.

Disability

The **Americans with Disabilities Act (ADA)** prohibits discrimination against those with disabilities and is enforced by the EEOC. Discrimination based on disability means treating a qualified person unfavorably because of a disability. For example, if someone has AIDS that is controlled, the employee cannot be treated unfavorably. The law requires an employer to provide **reasonable accommodation** to an employee or applicant with a disability, unless this accommodation would cause significant difficulty or expense for the employer. A reasonable accommodation is defined by the EEOC as any change in the work environment or in the way things are customarily done that enables an individual with a disability to enjoy equal employment opportunities. A reasonable accommodation might include making the workplace accessible for wheelchair use or providing equipment for someone who is hearing or vision impaired.

This law does not mean that organizations are required to hire unqualified people. The law specifically states the person must be qualified for the job and have a disability defined by the law. A disability defined by the law can include the following:

1. Physical or mental condition that limits a major life activity (walking, talking, seeing, hearing, or learning)
2. History of a disability (e.g., cancer that is in remission)
3. Physical or mental impairment that is not transitory (lasting or expected to last less than six months)

The law places limits on employers when it comes to asking job applicants questions about medical history or asking a person to take a medical exam.

Equal Pay/Compensation

The basis of this law is that people are paid the same for the same type of work, and the law specifically addresses gender pay differences. Rather than job title, job content is used to determine if the job is the same work. In addition to covering salary, it deals with overtime pay, bonus, stock options, profit sharing, and other types of bonus plans such as vacation and holiday pay. If inequality in pay is found, the employer cannot reduce the wages of either sex to equalize the pay.

An employee who files an equal pay charge has the option to go directly to court rather than the EEOC.

Genetic Information

This law is one of the newer EEOC laws, which took effect in November 2009. The EEOC's definition of genetic information includes family medical information or information about the manifestation of a disease or disorder in an individual's family. For example, an employer cannot discriminate against an employee whose family has a history of diabetes or cancer. This information could be used to discriminate against an employee who has an increased risk of getting a disease and may make health-care costs more expensive for the organization.

In addition, the employer is not allowed to seek out genetic information by requesting, requiring, or purchasing this information. However, there are some situations in which receiving this information would not be illegal:

1. A manager or supervisor overhears an employee talking about a family member's illness.
2. Information is received based on wellness programs offered on a voluntary basis.
3. If the information is required as documentation to receive benefits for the Family and Medical Leave Act (FMLA). FMLA is discussed in [Section 3](#).
4. If the information is commercial, such as the appearance of information in a newspaper, as long as the employer is not specifically searching those sources for the purpose of finding genetic information.
5. If genetic information is required through a monitoring program that looks at the biological effects of toxic substances in the workplace.
6. For those professions that require DNA testing, such as law enforcement agencies. In this case, the genetic information may only be used for analysis in relation to the specific case at hand.

This law also covers how information about genetics should be kept. For example, genetic information must be kept separate from an employee's regular file.

National Origin

It is illegal to treat people unfavorably because they are from a particular country or part of the world, because of their accent, or because they appear to be of a particular descent (even if they are not). The law protecting employees based on national origin refers to all aspects of employment: hiring, firing, pay, job assignments, promotions, layoffs, training, and fringe benefits. An employer can require an employee to speak English only if it is necessary to perform the job effectively. An English-only policy is allowed only if it is needed to ensure the safe or efficient operations of the employer's business. An employer may not base an employment decision on a foreign accent, unless the accent seriously interferes with job performance.

Pregnancy

This section of the EEOC refers to the unfavorable treatment of a woman because of pregnancy, childbirth, or a medical condition related to pregnancy or childbirth. The Pregnancy Discrimination Act of 1978, added to the Civil Rights Act of 1964, is enforced by the EEOC. The female who is unable to perform her job owing to pregnancy must be treated the same as other temporarily disabled employees. For example, modified tasks or alternative assignments should be offered. This law refers not only to hiring but also to firing, pay, job assignments, promotions, layoffs, training, and fringe benefits. In addition to this law against discrimination of pregnant women, the **Family and Medical Leave Act (FMLA)** is enforced by the US Department of Labor. US Department of Labor, *Leave Benefits: Family and Medical Leave*, US Department of Labor, accessed December 20, 2010.. The FMLA requires companies with fifty or more employees to provide twelve weeks of unpaid leave for the following:

1. Birth and care of a newborn child
2. Care of an adopted child

3. Care for immediate family members (spouse, child, or parent) with a serious health condition
4. Medical leave for the employee who is unable to work because of a serious health condition

In addition to the company size requirement, the employee must have worked at least 1,250 hours over the past 12 months.

Race/Color

This type of discrimination refers to treating someone unfavorably because he or she is of a certain race or because of certain characteristics associated with race. These characteristics might include hair texture, skin color, or facial features. Discrimination can occur when the person discriminating is the same race or color of the person who is being discriminated against. EEOC law also protects people who are married to or associated with someone of a certain race or color. As with the other types of anti-discrimination laws we have discussed, this law refers not only to the initial hiring but also to firing, pay, job assignments, promotions, layoffs, training, and fringe benefits.

Religion

This part of the EEOC refers to treating a person unfavorably because of their religious beliefs. This law requires a company to reasonably accommodate an employee's religious beliefs or practices, unless doing so would burden the organization's operations. For example, allowing flexible scheduling during certain religious periods of time might be considered a reasonable accommodation. This law also covers accommodations in dress and grooming, such as a headscarf, religious dress, or uncut hair and a beard in the case of a Sikh. Ideally, the employee or applicant would notify the employer that he or she needs such an accommodation for religious reasons, and then a discussion of the request would occur. If it wouldn't pose hardship, the employer should honor the request. If the request might cause a safety issue, decrease efficiency, or infringe on the rights of other employees, it may not be honored.

Sex and Sexual Harassment

Sex discrimination involves treating someone unfavorably because of their sex. As with all EEOC laws, this relates to hiring, firing, pay, job assignments, promotions, layoffs, training, and fringe benefits. This law directly ties into sexual harassment laws, which include unwelcome sexual advances, requests for sexual favors, and other verbal or physical harassment of a sexual nature. The victim can be male or female, and sexual harassment can occur female to female, female to male, male to female, and male to male. We discuss more details of harassment in Chapter 10.

Harassment at Yale?

[\(click to see video\)](#)

This 2011 video outlines a sexual harassment lawsuit at Yale University. The video shows that the lawsuit blamed Yale not for the harassment but for not taking a harder stand on this type of harassment.

Retaliation

In all the laws mentioned, the EEOC set of laws makes it illegal to fire, demote, harass, or retaliate against people because they filed a charge of discrimination, complained about discrimination, or participated in employment discrimination proceedings. Perhaps one of the most high-profile sexual harassment and retaliation cases was that of *Sanders v. Thomas*. Isiah Thomas, then coach of the New York Knicks, fired Anucha Browne Sanders because she hired an attorney to file sexual harassment claims charges. The jury awarded Browne Sanders \$11.6 million in punitive damages because of the hostile work environment Thomas created and another \$5.6 million because Browne Sanders was fired for complaining. Michael Schmidt, "Jury Awards \$11.6 Million to Former Knicks Executive," *New York Times*, October 2, 2007, accessed July 12, 2011.. A portion of the lawsuit was to be paid by Madison Square Garden and James Dolan, chairman of Cablevision, the parent company of Madison Square Garden and the Knicks. Browne Sanders's lawyers successfully argued that the inner workings of Madison Square Garden were hostile and lewd, and that the former marketing executive of the organization subjected her to hostility and sexual advances. Thomas left the organization as coach and president in 2008. As in this case, there are large financial and public relations penalties not only for sexual harassment but for retaliation after a harassment suit has been filed.

All types of discrimination and laws affecting multiculturalism are a key aspect for HR managers and managers to understand. These types of discrimination are discussed in Chapter 4, specifically, how they pertain to recruiting and hiring.

Military Service

The Uniformed Services Employment and Reemployment Rights Act (USERR) protects people who serve or have served in the armed forces, Reserves, National Guard, or other uniformed services. The act ensures these individuals are not disadvantaged in their civilian careers because of their service. It also requires they be reemployed in their civilian jobs upon return to service and prohibits discrimination based on past, present, or future military service.

Human Resource Recall

What types of discrimination (under the EEOC) do you think are the most common and why? Have you ever experienced discrimination in the workplace, at school, or in extracurricular activities? Explain.

Key Takeaways

- The *Equal Employment Opportunity Commission (EEOC)* is a federal agency charged with the development and enforcement of laws relating to multiculturalism and diversity in the workplace.
- The EEOC covers discrimination based on several areas. Companies cannot discriminate based on age; EEOC law covers people who are forty years or older.
- Employers cannot discriminate against people with disabilities and must provide reasonable accommodations, such as the addition of a wheelchair ramp to accommodate those with disabilities.
- Equal pay refers to the fact people should legally be paid the same amount for performing the same type of work, even if the job title is different.
- The newest addition to EEOC law prohibits discrimination based on genetic information, such as a history of cancer in a family.
- Unfavorable treatment of people because they are from a particular country or part of the world or have an accent is covered by the EEOC. An organization cannot require people to speak English, unless it is a requirement for the job or needed for safety and efficient operation of the organization.
- Women can't be discriminated against because they are pregnant. The inability to perform certain tasks due to pregnancy should be treated as a temporary disability; accommodation can be in the form of modified tasks or alternative assignments.
- The EEOC protects people from discrimination based on their race or color.
- Religion is also an aspect of the EEOC family of laws. The protection of religion doesn't allow for discrimination; accommodations include modifications of work schedules or dress to be made for religious reasons.
- Discrimination on the basis of sex is illegal and covered by the EEOC. Sexual harassment is also covered by the EEOC and states that all people, regardless of sex, should work in a harassment-free environment.
- Retaliation is also illegal. An organization cannot retaliate against anyone who has filed a complaint with the EEOC or a discrimination lawsuit.
- The US Department of Labor oversees some aspects of EEOC laws, such as the *Family and Medical Leave Act (FMLA)*. This act requires organizations to give twelve weeks of unpaid leave in the event of an adoption, a birth, or a need to provide care to sick family members.

Exercises

1. Visit the [EEOC website](#) and explain the methods an employee can use in filing a complaint with the EEOC.
2. If an employer is found to have discriminated, what are some “remedies” listed on the EEOC website?

Source: “Human Resource Management: Diversity and Multiculturalism”, Saylor Academy, 2012.

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2.4: WATCH- HR Trends for 2025- Companies Rethink Approach to IandD

In 2024, organizations continued to scale back and refocus their inclusion and diversity (I&D) efforts. At first glance, this could suggest that companies are abandoning their commitments to creating more inclusive and diverse workplaces. SHRM's Chief Data & Analytics Officer Alex Alonso discusses why the shift is more nuanced than it first appears.



Source: "[HR Trends for 2025: Companies Rethink Approach to I&D](#)", Alex Alonso, SHRM.

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2.5: READ- 6 Steps for Building an Inclusive Workplace

6 Steps for Building an Inclusive Workplace

Introduction

Under your HR team's leadership, your company has recruited a diverse workforce that includes a range of ages, ethnicities, religions and worldviews. Identifying and hiring people with such diverse backgrounds and characteristics is an achievement that you reflect on with pride. So now you can check off the diversity and inclusion (D&I) box on your to-do list for building a great workplace ... right?

Not so fast. Diversity is only half of the D&I picture. Creating a culture where people are respected and appreciated requires another level of effort that may not be getting the investment it needs.

"We often forget the 'I' in the D&I conversation," says Johnny C. Taylor, Jr., SHRM-SCP, president and chief executive officer of the Society for Human Resource Management (SHRM). "The challenge is in having a culture where all employees feel included. It's a major investment to bring talent into your organization, so why bring them in if they're not happy when they get here? You've got to get the inclusion part right."

Think of diversity as being similar to selecting people for a chorus who have different musical backgrounds, vocal ranges and abilities. The inclusion piece of D&I means making sure that those different voices are heard and valued and that they contribute to the performance.

When employees who are different from their colleagues are allowed to flourish, the company benefits from their ideas, skills and engagement, according to SHRM/Economist Intelligence Unit research. The retention rate of those workers also rises.

To that end, here are six practical strategies for creating an inclusive environment.

1. Educate Your Leaders

Your organization's executives and managers will be instrumental to your D&I efforts. "At the end of the day, it's the leader who's on the front line with our employees," says Dianne Campbell, vice president of global diversity and inclusion at American Express in Washington, D.C. "It's the experience that the leader is creating that is going to make or break" your D&I initiatives.

This year, Amex is rolling out mandatory training for people at the vice president level and above. It will start with the basics—what inclusion is and why it is important. Small groups will discuss strategies to foster it in the company.

"We have always focused on inclusion and know this is something that's important," Campbell says. However, "as HR practitioners, we take for granted when we say to leaders that they need to be inclusive that they know what we mean."

'As HR practitioners, we take for granted when we say to leaders that they need to be inclusive that they know what we mean.'
Dianne Campbell

At global pharmaceutical manufacturer Merck & Co. Inc., bosses at every level undergo training in unconscious bias, which occurs when individuals make judgments about people based on gender, race or other factors without realizing they're doing it. The training helps make people aware of this form of bias and drives home the importance of modeling inclusive behavior. Examples of inclusive behavior include engaging in active listening during performance reviews, encouraging different points of view in meetings and carefully choosing what language to use.

The company's global D&I team periodically evaluates its professional development offerings to ensure that managers have opportunities to learn how to better manage diverse workgroups. Members talk about how to deal with real-life scenarios that people managers face, such as supervising an employee who needs an accommodation for a disability or a worker who is a single parent with challenging child care issues.

"We look at the opportunities where people managers are making decisions about employees and integrate a D&I filter into those opportunities to ensure we are making decisions appropriately," says Celeste R. Warren, vice president, HR and global diversity and inclusion center of excellence at the Upper Gwynedd, Pa.

Leaders at Merck are also expected to demonstrate a commitment to inclusivity and, importantly, to be responsible for the environment in their respective departments. Ongoing feedback from their own managers helps to hold them accountable, as does tying the goal to their performance evaluations.

“Leaders—especially middle managers—must be held accountable for results,” says Erin L. Thomas, a diversity researcher and a partner at Paradigm, a D&I consulting firm based in San Francisco. That means structuring meetings, allocating resources and using language that advances inclusion. “Employees need to see that inclusive behavior is a core competency.

2. Form an Inclusion Council

Consider forming a council comprising a dedicated group of eight to 12 influential leaders who are one or two levels below the CEO. Carefully select them for their passion and commitment to inclusion.

“You need people who are going to make the time to roll up their sleeves” and do the work, says Jennifer Brown, author of *Inclusion: Diversity, the New Workplace & the Will to Change* (Purpose Driven Publishing, 2017) and president and CEO of Jennifer Brown Consulting in New York City. They need to be “a channel for communication” between the rank and file and the C-suite, and that includes advocating for inclusiveness in discussions with top executives when necessary.

Ideally, councils should be involved in goal-setting around hiring, retaining and advancing a diverse workforce and in addressing any employee engagement problems among underrepresented employee groups, Brown says. Most councils meet quarterly to review organizational feedback, troubleshoot challenges, and, most importantly, carry messages about their work to their senior peers and the C-suite, she says.

The councils should be as diverse as possible, with members representing not only different ethnicities and genders but also different business functions and geographic locations, for example, even if that means tapping individuals one or two grade levels below the C-suite. If this is difficult due to the lack of diversity in the top levels of your organization, make sure council members learn about your company’s diversity strategy from HR, the D&I team, and their colleagues in employee resource groups (ERGs) or business resource groups (BRGs). In this scenario, the pressing reality of the lack of diversity in top positions will also become a stark reminder that change is needed.

An inclusion council is different from ERGs and BRGs, which are sponsored by individual executives and typically serve as grassroots diversity business networks, usually for midand junior-level workers who share common backgrounds. ERGs and BRGs might be made up of veterans; new parents; or members of an ethnic, racial or gender-based group. They are a good D&I tool and provide a safe place for people to express themselves. Sometimes discussions that arise in these groups can even provide an early warning of issues bubbling up within the company.

The onus for inclusiveness, however, should not fall on the underrepresented members of your workforce, whether they be women, people of color or members of other minority groups. Those individuals often don’t have the power or influence to bring about change, Brown says. That’s where inclusion councils can take up the cause.

Inclusivity Checklist for HR

- Make sure company leaders understand that inclusion is about ensuring that everyone’s voice is heard, opinions are considered and value to the team is evident.
- Train managers—and hold them accountable—to show that inclusivity is a core competency.
- Form an inclusion council with genuine influence and power.
- Value differences and create an environment where people can feel comfortable bringing their “full selves” to work.
- Identify underrepresented groups’ needs, and give them necessary support and resources.
- Provide workers with a safe space to voice their concerns.
- Benchmark key aspects of your organization’s culture—and understand the employee experience—before making changes to promote inclusivity.
- Remember that daily interactions are the most telling sign of whether or not your company has an inclusive culture.

3. Celebrate Employee Differences

One of the most important ways to show employees that you respect their backgrounds and traditions is to invite them to share those characteristics in the workplace. For example, the HR team at Bak USA, a manufacturer of mobile computers based in

Buffalo, N.Y., holds potluck parties to celebrate the 14 nationalities represented among its 100 employees. Many employees are new to the U.S., and the events are a way to showcase the foods of their home countries, says Eva Bak, vice president of people.

The company promotes inclusiveness in other ways, too, with:

A meditation or prayer room. The need for a reflection space came to Bak's attention after she started giving up her office for 15 minutes every Friday so Muslim employees could use it to pray. It wasn't an inconvenience to her, she says, and the gesture meant so much to those individuals. Creating a permanent space, however, provided "that inclusion piece where people felt they could bring their 'full selves' to work," she says.

An enhanced HR presence for more-isolated employees. The company created a small HR office to serve production team employees who work on a different floor than the HR team and who often work different hours from the rest of the organization. It's also a place where those workers can have private conversations with their managers.

Last September at Merck, the company observed its second annual Global Diversity & Inclusion Experience month. It celebrated the differences among its 69,000 employees in more than 140 countries and offered presentations to employees about how D&I influences Merck's culture and business performance.

"It's well-known that diversity in teams leads to better decision-making, greater innovation and ultimately higher returns," Bak says. "But inclusion is what connects people to the business, and we believe it's one of the core reasons they stay."

4. Listen to Employees

To better understand their workers' experience, HR at American Express fields employee surveys and convenes focus groups to drill down on engagement and inclusion issues. Conduct a comprehensive assessment of your organization's demographics and people processes to develop specific strategies to promote inclusiveness, Campbell advises.

'We've created a very close-knit group of people who treat one another like family. I think that's incredibly powerful, especially when you look at everything happening in the world.' Eva Bak

Think about the culture you want and how you can create one that is authentic to your brand while meeting the needs of your employees. "We serve a diverse workforce, but, more importantly, we wanted to make it an inclusive workforce," Bak says. "That means making strategic decisions that align us with that thinking."

At Bak USA, leaders conduct regular town hall-style meetings as part of their communication with staff. "[It] teaches us what people really need and what makes them feel comfortable" and included, Bak says. "Just being listened to is important to people—being able to voice your concerns in a safe place. It can be daunting sometimes, especially [for] HR, to go into those meetings because you never know what you're going to be asked."

The company used to hold a separate holiday party for its production team to accommodate their nontraditional work hours. However, a response to an employee survey pointed out that the practice seemed to silo that department from the rest of the organization. Although only one person expressed this concern, the HR department thought the point had merit and now holds one celebration for everyone.

"We've created a very close-knit group of people who treat one another like family," Bak says. "I think that's incredibly powerful, especially when you look at everything happening in the world."

5. Hold More-Effective Meetings

An employee's daily experiences with co-workers are more telling about a workplace's inclusiveness than anything else.

"Determine the moments of truth in the workplace where any individual can impact diversity and inclusion," says Danny Guillory, head of global diversity and inclusion at San Rafael, Calif.-based Autodesk, a global software company. "What is most impactful is not what the CEO says, not what I say, but the experiences I have with the five or six people I work with every day. What are the key moments almost every employee touches where they can have an impact?"

Meetings are a prime example, says Guillory, who offers the following ideas for fostering an environment where contributions from everyone are encouraged:

- Distribute meeting materials in advance and share questions to be discussed. This is helpful for workers for whom English is a second language and for introverted employees who function better when they are given time to process

information before reacting to it.

- Reach out to teleworkers. Make sure you have the right technology for virtual meeting participants to have a meaningful experience. Welcome them to the meeting, ask them questions and pause to be sure they are given the opportunity to take part in the conversation.
- Rotate meeting times if you have remote workers in different time zones.
- Give credit where it's due. When someone is recognized for an idea that someone else put forward earlier in the meeting, point out who shared the idea originally.
- Be conscious of your communication style. Don't assume you know more than others by explaining concepts they may already understand—a behavior sometimes referred to as “mansplaining” when done by men to women.
- Promote active debate and be courteous. If one colleague interrupts another, call attention to it to underscore the importance of letting everyone be heard.

Creating an inclusive mindset is not a linear process, Guillory says. It will take time and a consistent effort. “There will be stops and starts” along the way, he says.

“Cultivating inclusion is an evolving process with constantly moving targets. You're never done,” Thomas points out. “A company's goals and tactics must evolve along with the needs of current and potential talent.

6. Communicate Goals and Measure Progress

Establish and clearly communicate specific, measurable and time-bound goals as you would with any other strategic aim. At one organization where Thomas worked, the employer took great care to quantify engagement within its BRGs. After 11 months of “high-touch management” from Thomas' team, BRG members reported double-digit increases across 12 measures of engagement.

“Every company should first benchmark their culture before they begin investing in it,” Thomas says. She recommends the following actions:

Conduct a full audit of your people processes—from recruiting and hiring to developing and retaining employees. Couple the data with engagement and other workforce survey data to gain a full measure of your climate.

- Identify any shortcomings and measurable discrepancies around inclusiveness in your organization.
- Instill rigor into inclusion strategies with data-driven plans, and measure the results.
- Establish a clear business case for how the company will benefit by having a more inclusive culture by asking:
 - What are our inclusion goals?
 - What are the reasons for those goals?
 - How do we quantify inclusion?
 - How will inclusion impact our mission, brand or bottom line?

“When you can answer these questions,” Thomas says, “you're speaking the language of your stakeholders, legitimizing the business of inclusion and making inclusion a ‘verb’ versus an ideal.”

Kathy Gurchiek is an associate editor on SHRM's online news team.

Source

- Kathy Gurchiek, "6 Steps for Building an Inclusive Workplace", SHRM, March 19, 2018

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2.6: READ- 3 Reasons Why Mark Cuban is Right About DEI

3 Reasons Why Mark Cuban Is Right About DEI

In several recent tweets, Mark Cuban weighed in on the DEI debate that has been gaining traction. One of the tweets included a response Cuban made to Elon Musk about the power of DEI to strengthen the talent pool. “DEI does not mean you don’t hire on merit,” Cuban wrote. “Of course you hire based on merit. Diversity – means you expand the possible pool of candidates as widely as you can. Once you have identified the candidates, you HIRE THE PERSON YOU BELIEVE IS THE BEST.” As expected, many naysayers offered empty arguments and critiques of Cuban’s perspective. This article explores Cuban’s claims in more detail and highlights how DEI (when done right) can positively impact an organization.

1. Strengthens the talent pool. Every organization must find quality candidates to fill open positions. A persistent DEI issue that companies across industries face is the struggle to find the best talent for open roles. Developing specific systems to eliminate bias in the hiring process can ensure that trivial aspects of an individual’s background, like their age, name, race, or gender, don’t impact their likelihood of being hired. DEI practices like anonymizing resumes, utilizing rubrics and scorecards, and implementing structured interviews are all strategies that can decrease bias in the hiring process and are likely to increase the chances of individuals from underrepresented populations getting hired.

Systemic inequities persist in organizations and institutions for many reasons. Within higher education, for example, many students are granted admission into elite institutions not because of merit or talent but because of their privilege and the access that their wealth (or rather their family’s wealth) grants them, which trickles down to who gets hired for what jobs. Within many industries, there’s a “good ol’ boys club” that subconsciously keeps women and non-white communities out. By incorporating DEI into the hiring and recruitment process, organizations can increase the chances of hiring the best, brightest, and most talented people for the job.

2. Goes beyond checkboxes and quotas. In a separate tweet Cuban, who is the minority owner of the NBA’s Dallas Mavericks, wrote a response to the question of whether the Dallas Mavericks team as a whole reflects the demographics of America: “If you understand the value of DEI, it’s not in checklists and quotas, it’s in understanding how to best compete as a company.” A popular myth about DEI is that it’s simply about check-the-box diversity and performative measures. Effective DEI programs must be specific, targeting the unique issues a company is facing, and must also include accountability measures to ensure success. DEI efforts shouldn’t solely fall on the shoulders of a DEI manager or chief diversity officer; that’s often a recipe for disaster.

Impactful DEI programs go beyond checkboxes and quotas; racial diversity for the sake of checking a box doesn’t work and can lead to tokenization. It should also be noted that racial quotas are illegal in the U.S. and have been illegal since a 1978 U.S. Supreme Court decision. Implementing DEI measures during moments of crisis is often counterproductive because it’s usually done without the thought and deep analysis required to address and resolve a specific issue. If your organization is called out for racial bias and discrimination, for example, implementing a training session to remedy the issue probably won’t be effective — Starbucks learned this lesson after a 2018 incident led to public scrutiny with the company deciding to introduce a half-day bias training. Racism cannot be “trained” away; baking DEI into the fabric of all company policies and practices ensures it’s embedded into the business and will increase the likelihood of DEI success.

3. Increases competitive advantage. In several tweets, Cuban explained why DEI increases a company’s competitive advantage. Dissenters have argued that all things DEI and “woke” will lead a company to “go broke,” but research may prove otherwise. McKinsey research has shown time and time again that when companies prioritize racial/ethnic diversity and gender diversity, it often leads to greater performance and profitability.

As a seasoned entrepreneur with keen business acumen, Cuban speaks from his extensive experience about the power of prioritizing DEI. The U.S. will be more racially and ethnically diverse in the future, becoming a reflection of the rest of the world. Younger generations want to work for companies that prioritize and value DEI. Failing to commit to DEI means there will be less interest in working for your company and may lead to consumer hesitance to support your products. Despite growing anti-DEI sentiments, it’s imperative to understand that jumping ship when it comes to your DEI objectives means your organization will not be sustainable in the future.

Correction, Jan. 7: An earlier version of this article mischaracterized Mark Cuban's stake in the Dallas Mavericks. He's part owner of the NBA team, not a former owner.

Source

- Janice Gassam Asare, "[3 Reasons Why Mark Cuban Is Right About DEI](#)." Forbes, January 7, 2024.

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2.7: READ- The Relationship Between Culture and DEI

The Relationship Between Culture and DEI

A good company culture is more than just snacks, perks and benefits. Employees and job seekers increasingly view diversity, equity and inclusion (DE&I) as a key attribute defining a good company culture, according to recent reports.

About 1 in 4 job seekers in 2021 said DE&I is the most important area of investment to improve company culture, according to a survey by LinkedIn Talent Solutions. The report suggested that boosting DE&I efforts to create a more diverse workforce helps employers build a dynamic relationship with employees.

"A strong DE&I presence creates a culture where employees feel empowered to be authentic and bring new ideas based on their unique knowledge and experiences," said Risha Grant, an award-winning DE&I speaker and expert based in Tulsa, Okla. "You will not have a good company culture if DE&I is not present."

Diversity allows workers from underrepresented communities to connect with their peers and feel celebrated. Ineffective DE&I efforts can cause these individuals to harbor negative views of their company's culture, Grant said.

She said employees may feel their input is undervalued in a homogenous culture. If companies continue to seek culture fits instead of culture additions, they may fail to compete with more diverse organizations in areas such as recruitment, retention and innovation.

"If your culture is not one that respects and includes workers based on their differences, even with the greatest of recruiting efforts, diverse candidates will not thrive and will not stay," said Yuvay Meyers Ferguson, assistant dean of impact and engagement and associate professor in the School of Business at Howard University in Washington, D.C.

Minority Workers Less Likely to Praise Culture

Recent research by the Society for Human Resource Management (SHRM) showed a discrepancy in the way people from different races and backgrounds view their company's culture.

One survey, *The Culture Effect: Why a Positive Workplace Culture Is the New Currency*, indicated that Black workers were more likely than white workers to say their organization's culture made it difficult to balance their work and home commitments.

Additional SHRM research found that white (61 percent) and Hispanic (71 percent) workers were more likely than Black workers (40 percent) to rate their workplace culture as "good" or "very good." Black and Hispanic or Latino workers were also more likely than white workers to be actively searching for a new job.

Trust issues may be feeding into how Black workers view their culture, according to a 2021 report by management counseling firm McKinsey and Co. The survey showed that Black workers were less likely than white workers to say their company treats them fairly and rewards them for good work.

Paying minority workers equally, providing reasonable pathways to promotion and empowering these individuals to share their experiences without retaliation can create a sense of belonging among employees from underrepresented communities.

"[Employees] want to connect with their peers and to the work they do," said Sirmara Campbell, chief human resources officer at LaSalle Network, a staffing, recruiting and culture firm in Chicago. "The more companies create a sense of belonging for all employees, the more they will want to work hard and give back to that organization."

The Importance of Leadership

Campbell said a thriving, diverse company culture requires leaders to build relationships with staff, spend time training them and learn about them as unique individuals.

"Culture is what retains employees during the down times, like the pandemic and subsequent financial recession, because culture builds loyalty," she said.

The LaSalle Network provided tips for improving a company's overall culture:

- Focus on career development. Investing in employee development is a direct reflection of a company's investment in employees. Employees who achieve their learning goals are more likely to use those skills to support the company.

- Enhance communication. Constructive and consistent feedback allows employees to continue to grow. Routine conversations about performance keep employees engaged with the company.
- Establish a clear set of values. Educating employees on values helps them connect better with the company and understand their role in the organization.

Alana Elston, chief people officer at the architecture firm McKissack & McKissack in Washington, D.C., said inspirational leadership is an important aspect of creating a diverse company and enhancing its culture. She said an organization comprising mostly employees from similar backgrounds does not foster a thriving, engaging environment.

"Employees must feel inspired to do their best work, and that comes from management, mentorship and leadership," Elston said. "People must be in an environment where they feel inspired. They must come to the table feeling inspired."

Elston noted, "That makes an inspirational culture huge in terms of importance."

Source:

SHRM, 2024, article no longer available.

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2.8: WATCH- Belonging, A Critical Piece of Diversity, Equity, and Inclusion

We've all heard presentations about the importance of DEI. In this powerful talk, Carin Taylor shares why belonging is the focus of her DEI strategy and the most important piece of the DEI discussion. She outlines the key ingredients needed to belong and how to create them.



Source: "[Belonging, A Critical Piece of Diversity, Equity & Inclusion](#)" | Carin Taylor | TEDxSonomaCounty

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2.9: WATCH- Achieving Psychological Safety

The leadership environment in which we work can drastically change the feelings of safety within a team.



Source: "[Achieving psychological safety](#)", Simon Sinek.

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3: Organizational Culture

Organizational culture is the shared values, behaviors, and norms that shape how people work together. It influences decisions, communication, and the overall environment. By understanding it, we can see how organizations function, adapt, and create spaces where people feel engaged and motivated.



Image Source: Dr. Hashim AlZain. [Delivering Happiness: A Path to Profits, Passion and Purpose](#). Medium.

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3.1: READ- Understanding Culture

Understanding Culture

When my parents came to the United States in 1979, their world became vastly different than what they had known. Before their arrival, they lived in a small hilltop, tribal village in the mountains of Laos, like many of their ancestors before them. They had the simplest tools for doing their work and for living their lives. The natural world provided everything they needed. If they wanted to use the bathroom, they went outside—not to an outhouse but to the woods. When they were hungry, they cooked the meal in a pot over a large fire pit. When relatives asked them to attend celebrations and notified them that the celebration meal would begin sometime when the sun was to set, my parents knew that the path of the sun would let them know when they should leave their house.

There were a lot of assumptions my parents made about their world. When they had to relocate to the United States, they found out how different their assumptions were when they were tested in an environment that contradicted their ways of being. They were not aware of a different way of living their lives, because the norms that shaped their lives influenced their actions and behaviors. The norms helped them to learn that what they did was the correct way to live.

One of their most difficult challenges was to unlearn what they knew in a different context and with different materials and tools that they did not have before. What naturally occurred was a process of culture shock and then a period of acculturation. When my parents' sponsors showed them how to use the toilet by gesturing what to do and how to flush, my parents were embarrassed. Coming from a culture where modesty is important, they did not know how to respond to the American sponsor's gestures, yet their embarrassment quickly turned into fascination when they saw how a toilet could dispose of materials.

Interpreting body language became a critical piece of adaptation and learning. My parents found the exaggerated gestures of their sponsors turning on and off the stove "different." But it was paying attention to the facial gestures and body language that helped them to understand how to operate a stove. They realized certain things were the same across cultures: taking out a pot to boil water, placing it on a heated surface for the water to boil, taking the pot off the surface to let the water cool. The differences, they noticed, were in the equipment used and the timing of the water boiling. What a surprise it was for them to realize that one could adjust and control temperature!

As human beings who are accustomed to behaving (consciously and unconsciously) in specific ways, we often do not recognize another perspective until it is presented to us. Ellen Langer, Langer (1990), a social psychologist, says that it is in the perspective of another that we learn to see ourselves—to see who we really are. As an educator and facilitator, I meet people in positions of leadership every day who believe that their perspective about culture and how they should work with differences is the right way and that there is no other possibility for a different way of working or thinking. For example, a participant in my training session, Jacob, felt very strongly about the "invasion" (his word, not mine) of immigrants in his neighborhood. As a result, the city he worked for was increasingly diverse and would need to set up services and programs to meet the needs of the new immigrants.

As a native of the city, Jacob felt strongly that his neighbors needed to assimilate more quickly. As a city employee and manager, he felt excluded that the city would create new services for the immigrants. His issue of conflict here was that he had developed proposals for expanding current services in his department, but they were never approved, mostly because of budgetary reasons. He did not understand why creating "special services for a small population" mattered more than the services for current residents of the city, and he was angry that the funds set aside for the new programming would be large, much larger than his proposed changes.

Jacob, in this example, is bound to his single perspective or viewpoint. He cannot see beyond the situation. And, in fact, when discussing this situation with Jacob and other managers present, other pieces of the story began to unravel. Yes, Jacob had a perspective about immigrants based on his experiences with one immigrant—his neighbor. He used his knowledge and interactions with this person to generalize to an entire population. Additionally, what really mattered to him in his place of work was that he did not feel his ideas mattered. Because every time he proposed changes they were not approved, he took that as a deliberate attack on him. This was not the case at all and he was told this by his peers in the training.

When Jacob was presented with another perspective, he let his guard down. Over time, he was able to focus on the real issue, which was that no matter what your status, creed, ethnicity, or reason for moving to the United States, as a public sector employee it was his role to provide the appropriate services that would meet the residents' needs.

As leaders, we must make strong efforts to see a different perspective than what we believe and hold to be true. We must challenge ourselves, as Byron Katie (2002) says, by asking whether we know what we see to be true is really, in fact, true. And if it is, how do we know that? What stories have we told ourselves? To understand this, we need to look at the “roots of culture” and how our cultural systems have shaped our realities of the world.

2.1 Cultural Systems

Imagine a tree as a metaphor for a **cultural system**—all the things that make up who you are. The roots of a tree are essential for the survival of the tree. They carry the nutrients needed for the growth of the tree and store nutrients for later feeding. Roots of trees are generally located in the top 6 to 24 inches of the ground, not too deep from the surface. The roots are impacted by their surrounding, and environmental factors contribute to their health and vitality.

Just like the roots on a tree, cultural systems have roots that are impacted by their surroundings. A culture’s rituals, traditions, ceremonies, myths, and symbols provide it with the nutrients it needs to survive. Environmental factors can change a tree by uprooting it or letting it die off, making space for new life in its place. Similarly, environmental changes impact cultural systems, forcing it to adapt and change to its surroundings or transition into death, creating new cultural stories that carry new life.

But unlike trees and their roots, we get stuck in our cultural systems and do not budge even when our surroundings have changed. Trees, like anything in an ecosystem, have natural cycles of renewal and rebirth. Sometimes this renewal and rebirth is gradual and gentle, while other times it is fast, disruptive, and violent. Trees, because they share their environments with others, will learn to adapt and allow change to occur, no matter what the direction of change may be. Change in their cultural environments is inevitable and a part of the life cycle.

In similar ways, we can think about our cultural systems as part of a larger system. Some cultural anthropologists would describe the cultural systems as “big C” (macroculture) and “little C” (microculture). The **macroculture** refers to a larger cultural system, for example, Catholicism is a culture that is not bounded by geography. Within the macroculture of Catholicism are smaller units of culture called *subcultures*. Change is constant in each cultural system, and transitions, renewal, and rebirth are endless cycles. As cultural shifts occur in the macro- and **microcultures**, small and large, gradual and disruptive, the entire system learns to adapt in different ways.

2.2 What is Culture?

Definitions of culture cover a wide range of **perspectives**. When I ask participants in my business workshops to describe culture, the following are words and phrases they use: *food, religion, language, music, region or geography, ethnicity, clothes*, and so on. Generally, there is always one person who raises his or her hand timidly and says, “I think culture is more than that. It’s the things we don’t see, like our beliefs or views about gender.” Both are correct—culture represents the things we see, the tangible, as well as the intangible things.

Figure 2.1 Iceberg Metaphor



The iceberg, a commonly used metaphor to describe culture, is a great example for illustrating the tangible and the intangible. When talking about culture, most people focus on the “tip of the iceberg,” which is considered as making up 10% of the object. The rest of the iceberg, 90% of it, is below the waterline. Most leaders in businesses, when addressing intercultural situations, pick up on the things they see—things on the “tip of the iceberg.” This means that they never address the cultural issues and problems that are underneath the surface level. Solutions become temporary band-aids covering deeply rooted cultural systems.

I once had a manager describe and define culture as “a monster.” After some laughter from the group, he clarified his statement: “It’s so messy and sometimes it’s too big to handle. And, it’s scary because you don’t know what you’re dealing with.” What he said rings true for many people and businesses that work in multicultural settings. It is certainly not fun to clean up cultural messes, bloopers, or misunderstandings, and when not addressed right away, they can result in large cultural conflicts. The ability to acknowledge one’s cultural mistakes, and having a commitment to learning what culture brings, is a skill that one must have in cultural intelligence work.

This definition of culture as a “monster” is one that looks at culture and its manifestations. Some may even say it is negative and does not paint culture in a positive light. From my experiences working with leaders, defining culture is not about positives or negatives—*culture just is*, and that is why it can be a challenge to describe it. Definitions of culture usually incorporate an expression of values and beliefs of groups, the learning that occurs in groups, and the expressions of those cultural norms.

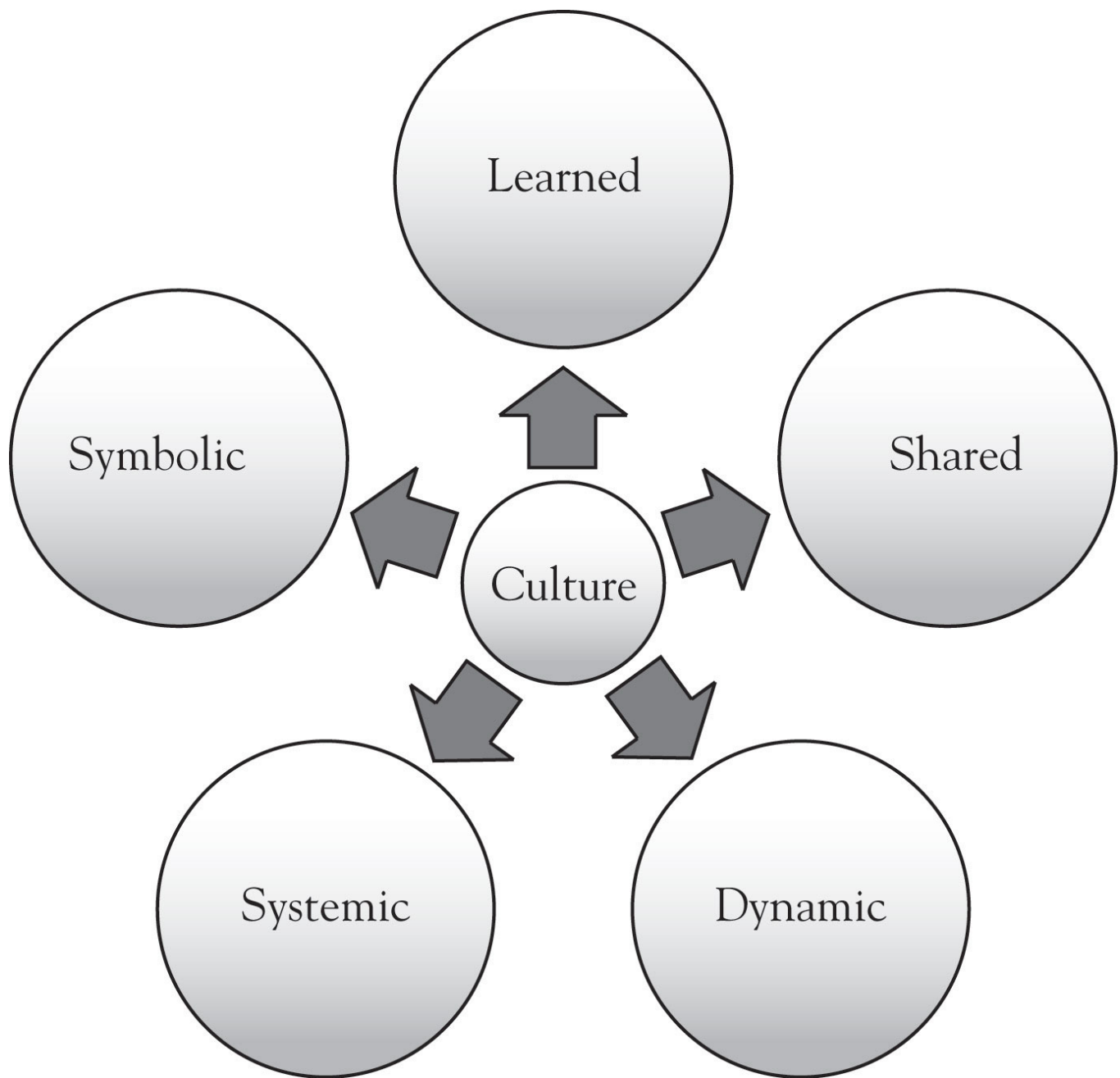
The following is a definition of culture that is used in this book and that will be useful in your work: This definition of culture has been adapted from Edgar Schein’s definition of culture.

Culture consists of the shared beliefs, values, and assumptions of a group of people who learn from one another and teach to others that their behaviors, attitudes, and perspectives are the correct ways to think, act, and feel.

It is helpful if you can think about culture in the following five ways:

- Culture is learned.
- Culture is shared.
- Culture is dynamic.
- Culture is systemic.
- Culture is symbolic.

Figure 2.2 Elements of Culture



2.3 Culture is Learned

Geert Hofstede (1991). views culture as consisting of **mental programs**, calling it *softwares of the mind*, meaning each person “carries within him or herself patterns of thinking, feeling, and potential acting which were learned throughout their lifetime.” Hofstede (1991), p. 4. Similarly, Peter Senge (1990), pp. 8–9. argued that mental models lock individuals and groups into a specific perception about the world. Like a computer, we are programmed to act or behave in certain ways. The conscious and unconscious learning we undergo, over time, turns into beliefs that we consider to be valid. We then teach each other that these beliefs are cultural norms, and they are then expressed in our daily lives as behaviors and actions.

Think about your first day with your current organization or one you worked for in the past. Typically, your boss or a co-worker gave you an orientation to the company, describing its mission, products, and services. Most likely, you met your co-workers and received a tour of the office facilities. Perhaps you met and talked with co-workers to get a sense of how job related to their work. Maybe you spent time reading company materials, reviewing your department files, or talking with your supervisor about the details of your job responsibilities. Perhaps you had lunch with other staff members and were told about some parts of the

organization such as, “Jane Doe should be fired but is still working here,” “The CEO has control issues,” or “The fax machine breaks down three times a day.” Whatever you did in those first hours or days of orientation and training, you created an image of how you would fit into the company. In that moment, you told yourself a story of how you would work with the company and how it would work with you because others in that business culture told you how you needed to behave. This moment is so powerful that it shapes your experiences, including your thoughts, actions, behaviors, beliefs, and attitudes for the rest of your time with the company.

2.4 Culture is Shared

Ming is a recent college graduate with a degree in accounting. She has taken a job with a large accounting firm. Although she gets along with members of her department and team, she tends to spend her free time with other colleagues who are of Asian descent, especially those who are in her generation. She feels that this group of coworkers understands her better and shares her values and ideas around work–life balance.

John has been with his state employer for thirty years, working up the ranks into seniority in his state agency. It’s been customary for him and six coworkers of his age group to meet for lunch every day and discuss the latest sporting events. Once a week during the summer they meet up after work to play baseball at a local park and recreation site.

These two examples describe culture as a shared learning experience. Although you may think of yourself as an individual, you share beliefs, rituals, ceremonies, traditions, and assumptions with people who grew up or live in similar cultural backgrounds. It is easier for you to relate to someone who has shared value systems and ways of doing things than someone who does not share the same values.

The patterns of culture bind us together and enable us to get along with each other. Even though it feels good to be around people who think, act, and behave as you, shared learning can create blind spots. Shared cultures create a dynamic of an in-group, where people segregate themselves from each other. Within teams in organizations, in-group blind spots can lead to “**group think**,” a term coined by Irving Janis (1973), pp. 19–25, to explain the ways in which groups ignore alternative solutions and take on actions and behaviors that discount the experiences for others.

2.5 Culture is Dynamic

Culture is dynamic and thus complex. Culture is fluid rather than static, which means that culture changes all the time, every day, in subtle and tangible ways. Because humans communicate and express their cultural systems in a variety of ways, it can be hard to pinpoint exactly what cultural dynamics are at play. Consider, for example, a conversation about a person’s attitude or feelings. In this type of conversation, Albert Mehrabian (1971) found that people pay attention to (a) the words, or what is being said; (b) the tone, or how the words are said; and (c) the visual behind the words, often called the body language. All of these are aspects of culture that are interpreted differently depending on the cultural context. Add multiple layers of culture to the conversation—such as time, power and authority, emotion, age, gender, religion, nationality, and even previous intercultural interactions—and communication at a cross-cultural level becomes complex and hard to manage. The following is an example of the dynamism of cultures:

Sheila is the director of marketing for a social services agency. She provides feedback to one of her managers about how to improve services. Sheila sits behind a large executive desk and is leaning forward. The employee sits with her arms crossed, leaning away from Sheila.

If you were observing this scene, are you able to tell from the body language what each person is thinking? Why or why not? What cultural factors might be present?

In the example, Sheila’s body language can be interpreted as any of the following: eager to assist or help, intensely interested in what the employee has to say, aggressive and wanting more information, or needing deeper engagement in the conversation. Her employee’s body language could mean any of the following: protective, suspicious, not caring, or relaxed. To understand the dynamics of culture in this example, you would need to pay attention to the things you do not see such as:

- Is Sheila older or younger than her employee?
- What has been their working relationship?
- Does Sheila naturally lean forward when speaking with her employees?

- What is the tone of voice in the conversation?

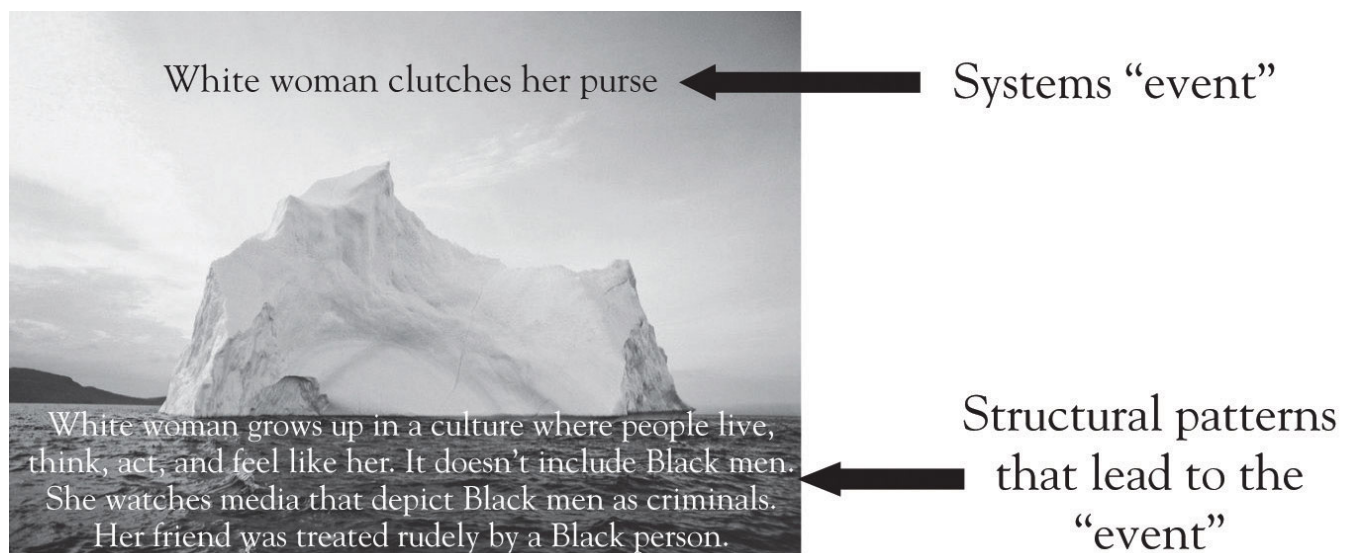
2.6 Culture is Systemic

In systems theory, systems are interrelated, interconnected parts that create a whole. There are patterns of behavior, deeply rooted structural systems, which are beneath the waterline. What we see at the top of the iceberg are the behaviors; we do not see what contributes to those behaviors. Consider, for example, a white woman walking down a quiet street. She quickly clutches her handbag closer to her body as she passes a black man. Then, when she spots a white man walking toward her, she loosens her hold on the purse.

To address the system, one must be able to address the underlining patterns. These patterns, because they are deeply embedded in the system, will take up significant effort, time, and resources. Changes to the system are slow and gradual; visible changes may not appear until months, or even years, later.

Because most leaders spend their time evaluating and finding solutions to an “event,” they revisit the issues over and over again, with no positive and sustainable results. The following case study illustrates the systemic nature of culture:

Figure 2.3 Culture from a Systems Approach



Langley, Knox, and Cooper, a law firm in the Midwest, knows that it has to do more to be inclusive to women attorneys. It has met challenges in retaining its female work force. The majority of women hired to work at the firm leave within a three year period. To address the issue, the firm provides gender sensitivity training to the entire company, attends graduate career fairs to actively recruit female attorneys, and has quotas for promoting women. However, the efforts in the past five years have yielded little results.

Langley, Knox, and Cooper focus much of their attention on the “events” of the system: women leaving after three years or providing gender sensitivity training. A look at the structural patterns reveals a more complex issue that cannot be solved through training and career fairs. The structural pattern is an insidious belief that women enter the law profession with the same opportunities and access to practicing law as men in the firm. Underlining this belief are more patterns of thought that keep this structural pattern in place. Possible patterns of thought could be:

Figure 2.4 A Systems Approach to Find Structural Patterns in Gender Conflicts



The “events” of the system
What are the events in this case study?

Possible structural patterns
What could structural patterns be?

- Other women attorneys don’t have this problem, what’s the big deal here?
- Everyone faces the same challenges in making partner. It’s part of becoming a lawyer.
- We match our junior attorneys with senior attorneys who serve as their mentors. Everyone gets the same level of attention, so I am not sure what all the complaints are about.
- This law firm is different from others. If they don’t like it here, then they can leave.
- We give the women in this firm more time off and flexibility than ever before, yet they still think it’s not enough.

Understanding the thoughts help leaders to recognize that yearly gender sensitivity training would never work. These thought patterns, when combined and supported (intentionally or not), are difficult to unravel. The systemic nature of the problem becomes more complex and chaotic as time goes by and the issues are not addressed.

2.7 Culture is Symbolic

Symbols are both verbal and nonverbal in form within cultural systems, and they have a unique way of linking human beings to each other. Humans create meaning between symbols and what they represent; as a result, different interpretations of a symbol can occur in different cultural contexts. Take, for example, a meeting of senior executives who need to make a decision about a new service. This group of leaders has a team culture that orients itself toward a democratic process: decision making is based on one vote from each member. Now imagine a similar group of leaders with the same task but, this time, the group of leaders is comprised of Native Americans. Leaders who are younger in the group ask their elders for advice. This is an example of how cultural systems differ in their interpretation and expressions of culture. In some cultural systems, voting is not an option. The symbol of a *vote* has different meanings and interpretations—or simply may not even exist in any practical sense—depending on the cultural background.

2.8 Stereotypes and Generalizations

One of the things that can happen in the context of discussing culture is falling into the stereotypes and generalizations of a cultural group or norm. It is important to recognize the difference and the impact these factors have in cultural interactions. In general, **stereotypes** are negative statements and interpretations made about a group of people. Stereotypes, whether deemed positive or negative, place people into boxes and categories and limit them to those specific perspectives. A stereotype, such as “Asians are good at math,” does not provide the complete picture someone needs to understand the Asian culture or the differences between Asian cultures. Similarly, just because you meet a 70-year old who does not know how to use current technology, it does not mean that other individuals in that generation do not know how to use it.

By contrast, **generalizations** of cultures are broad statements based on facts, experiences, examples, or logic. There are two kinds of generalizations, valid and faulty, and it is your role to determine which generalizations have validity behind them. Broad characterization of cultural groups can serve as a framework for cultural interactions. For example, Hispanic societies have a high degree of machismo, or, in Middle Eastern cultures, women have a lesser status than men—these types of generalizations are helpful when engaging with people of those cultures. But in all cultural interactions, culturally intelligent leadership requires you to recognize that generalizations do not apply to everyone within a cultural group.

2.9 Levels of Culture

One of the basic tenets of culture is that it consists of levels and sublevels. It is useful to think about culture in terms of five basic levels: national, regional, organizational, team, and individual. Within each of these levels are tangible and intangible sublevels of culture.

National Culture

A businesswoman from the United States is in Germany for contract negotiations between her employer and a large German bank. The meeting is scheduled for nine o'clock in the morning. When she arrives to the meeting a few minutes before its start time, she is amazed that all her German counterparts are already seated and ready to begin the meeting. A few days later, upon her arrival back to the United States, she remarks to her American colleagues her experience with German culture. In particular, she notes their level of attentiveness to punctuality and planning and says, "I thought we were punctual here in the U.S.! It's nothing compared to how Germans view punctuality."

This example illustrates the national differences between two cultures: American and German. National differences refer to the cultural influences of a nation that result in its national characteristics. Although nation-states have regional and political differences, **national culture** can be viewed as the values held by a majority of the population within the nation. These values are largely unconscious and developed throughout one's childhood. The values are pushed to a level of consciousness when in contrast to another nation's cultural values.

Within national cultures, values are generally seen as stable over time. National values, because they reflect the traditions of the nation-state over time, will change slightly from generation to generation, but the overall values will remain the same. For example, a German who comes from a culture of punctuality and travels for business in Italy will notice a national cultural difference in how Italians view time (more leisurely and relaxed) as compared to their own national culture.

Regional Culture

An interesting thing about living in the United States is the regional differences that make each part of the country unique. When I attended college in Boston, I heard the expression "wicked" used quite often. After asking my New England friends what "wicked" meant, I learned that it was used to emphasize a point. If I attended a concert that I really enjoyed, I would say, "That concert was awesome!" New Englanders would say, "That concert was wicked awesome." After living in the Boston area for 4 years, the word became a part of my vocabulary. When I used the word in conversations with my friends and family members in Minnesota, they did not understand what I meant.

All national cultures consist of **regional subcultures** that influence the characteristics of one group from another in a nation state. The word "pop" refers to a soft drink in the Midwest, but if you go to the East Coast, it is referred to as "soda." In other regions of the United States, a soft drink is referred to as "Coke." The following is an example of regional cultural differences and one way the difference is expressed:

Dianne moves from Texas for a job opportunity in Georgia. She lives in Georgia for 25 years and feels that it is her home state. However, her neighbors and co-workers do not think that she is a Georgian. Even though Dianne thinks she is from the south, she is reminded by others that she is "not a southerner."

Dianne experiences a regional cultural shift that she did not know existed until her move. Although she considers herself a Georgian, she is constantly reminded that she is not a southerner. At a conscious and unconscious level, her regional cultural experiences will dictate her thoughts about herself and others. She may develop the following assumptions and beliefs as a result of the regional cultural influences:

- I better just tell people that I am from Texas.
- Georgians think that you have to be from certain states to be considered a "southerner."
- If you are from the south, you must have lineage or roots that directly link you to the south. A "transplant" is not considered a true southerner.

What are regional differences and similarities that you have experienced or have been a part of? The following is a chart to help you identify regional similarities and cultures. In the column labeled "*Regional Culture Names*," write down two regions of a

nation or country, such as West Coast and New England. Then, for each cultural expression listed, write down the regional similarities and differences you notice about each region you have chosen to identify.

Table 2.1 Exercise to Identify Regional Cultural Differences and Similarities

Regional Culture Names	Cultural Expression	Regional Differences	Regional Similarities
	Food		
	Dress code		
	Language		
	Housing		
	Music		

Organizational Culture

When you walk into a Target Store, what do you see? What does it look like? What kinds of items do they sell? What do you see when you walk into a Wal-Mart? What does it look like? What types of people shop at Wal-Mart? Who works there?

Shoppers have different experiences walking into a Target versus a Wal-Mart store because even though they are both retailers, their buildings are different, the types of products they carry vary from each other, the workers wear different clothes, the layout of a Wal-Mart store is very different from the layout of a Target store, and the behaviors expressed by workers in each organization are unique to each retailer. These elements give the organization its distinct culture that separates it from the other.

Organizational culture speaks to the culture that is specific to an organization—the culture that makes it distinctive from competitors and non-competitors. Organizational cultures are often referred to as “corporate cultures” and reflect the beliefs, values, and assumptions of an organization. For example, the culture of one school in a school district can be different than the culture of another school located in the same district simply because of what the people in one school culture adhere and react to.

Team Culture

Lupe oversees a business division that includes sales people, engineers, research, and customer service staff. All teams work in different ways to accomplish their business strategies, but they also have work that is cross functional, relying on each other to get their work completed. At times, Lupe is overwhelmed at the teams’ cultural differences and the impact it has on productivity and sales. She knows that each team has their own working styles, but she didn’t realize how much these styles could interfere in the day to day operations of the division.

The sales department seems more outgoing and energetic than her engineers, who as a whole seem introverted and serious. Her researchers are detailed and scientific in nature, always questioning the tactics of the sales people. Her customer service employees who are by nature people and service friendly and always wanting to make sure everyone gets along. These departments work well, but Lupe knows that silos in the organization can hinder growth and creativity.

The example above illustrates culture at the **team level**. The values, beliefs, and norms of culture are present in team environments, dictating the team’s operations and efficiency. Cultural norms in teams guide members in their dress and appearance, their language, how they relate to one another, and how they get along. Some teams are very serious, while others use humor in their work life. Departments, teams, or workgroups can, and will, act very differently from each other even though they are located in the same building and in the same organization. Although you might not think about personality or temperament as cultural elements, they can and do shape a team’s culture.

Individual Culture

Individual cultural differences relate to your preferences for things through your personal experiences that include the influence of your family, your peers, school, media, co-workers, and so on. You may share a national culture, such as being an American, with another person and live in the same regional culture, the Midwest. You may even work with the person in the same organization and department, thus sharing an organizational and team culture, and even though you share similar interests, you will likely have

differences in **individual culture** based on who you are and your social upbringing. The following example illustrates these individual differences:

Bao, 31 years old and Hua, 32 years old, are both Chinese American managers living in San Francisco. They both grew up in the area as third generation Chinese Americans. Both attended universities on the East Coast in the same city and majored in public policy. Bao and Hua work for a national nonprofit that funds grassroots leadership projects in Chinese-American communities in the United States. Both work in the programming department of their organization and have been there four years each.

Bao and Hua, although similar in their cultural backgrounds, have different perspectives based on their individual cultures. Bao's mother passed away while she was very young and she was raised by her father and aunts. Her father was not around because of long work hours. Bao, with the help of her aunts, raised her younger siblings. Her mother's death was a significant event in her life as she felt she did not have the mother-daughter relationship that many of her peers did. As a result she is overly protective.

Hua is the youngest child in her family. Both her parents are still alive. Hua was raised around many of her relatives who took care of her while her parents were working. She has always been given what she wanted or needed. Whenever Hua had a problem, her older siblings took care of the situation. As a result, Hua is quite relaxed in her demeanor and approach to life.

When Bao and Hua make programming decisions, Bao approaches her decision-making process from a methodical and careful perspective, always looking out for the program's and organization's needs. Hua, on the other side, is more relaxed in her approach, more willing to allow for flexibility and ambiguity.

Bao and Hua's cultural experiences have shaped them into different individuals and have impacted their managerial and leadership styles. Even though they share many similar cultural experiences, their individual cultural experiences have strong influences on them. Bao's methodical and careful decision-making processes are a result of her having to be responsible at a very early age. Hua's relaxed approach comes about because of her experiences as the youngest child and always knowing that she would be taken care of—that everything would be okay in the end.

These five levels of culture are important to think about and recognize, but it should also be understood that each of these cultures can be expressed in subcultures or microcultures. Not everyone acts or behaves the same in a national culture such as the United States. There are regional, county, and city differences within the national culture of being an "American." There are religious differences as well as gender cultures, ability and disability cultures, cultures revolving around sexual orientation, and even cultures centered around concepts or states of being, for example, the culture of homelessness or the culture of juvenile delinquency.

2.10 The Roots of Culture

Cultures show up in many forms and are expressed differently. Yet all forms and levels of cultures express and share three fundamental aspects: values, assumptions, and symbols.

Values

You need to recognize that value systems are fundamental to understanding how culture expresses itself. **Values** often serve as principles that guide people in their behaviors and actions. Our values, ideally, should match up with what we say we will do, and our values are most evident in symbolic forms. Consider, for example, a picture of the American flag. If you were an American, what words do the pictures evoke for you? *Freedom, liberty, America, united, independence, democracy, or patriotism*, perhaps?

What if a Nazi symbol were painted on the American flag? How would that make you feel? *Disgusted, sad, angry, revengeful*? What would the desecration of the flag symbolize? *Hatred, terrorism, nationalism*? What about *freedom of speech*? Symbols like the American flag evoke strong emotions for people, and when the symbol is desecrated, it can feel like a personal attack on the person's value system and their beliefs about the world. It feels out of alignment from what we believe to be true—what we see as our reality of the world. This is because our values and beliefs are rooted in stories we tell ourselves over and over again.

Joseph Campbell (1988). noted that stories and myths are our psychological maps of the world. We use them to guide our thinking and behaviors, and when we do not like a story or it does not align with stories we know, we discard them. We learn through culture to create a story about the story. Campbell said that when we can unravel our stories, we begin to see the meaning we have placed on them and the impact they have on our lives. The case study that follows illustrates this notion of values:

James works full-time managing a fast food restaurant chain. Working extra hours every week helps him bring home more income for his family of four. He will do whatever it takes to help take care of his family. Ana is also a manager in the same restaurant. She works her forty hours a week and then goes home to her family of three. She doesn't want to work more hours because she wants to spend as much time with her family as possible.

How does James's perspective of family differ from Ana's? What assumptions does each have about the value of *family*? What might be the stories they are creating for themselves that shape their values of family? Both individuals have the same value of *family*, but their values are expressed differently through their behaviors. A value such as family can be expressed and thought of differently from one culture to the next or from one person to the next. James believes that working hard illustrates his value of family, while Ana believes that spending time with her family demonstrates her commitment to the value. These assumptions are not expressed verbally, and, in some cases, the assumptions can be unconscious. Notice how, in the following scenario, James' assumptions are challenged:

Both Ana and James receive a bonus for their work. James finds out that Ana has received the same percentage of bonus that he has. He's quite upset because he knows that he works more than she does and sometimes covers her shifts when she has family emergencies or is late because of day care issues. He thinks to himself, "How could she get the same bonus as me? She doesn't even work that hard and she comes in late to her shift using excuses that her day care didn't show up again."

In the case study, the assumptions that James has of Ana (Ana makes excuses; Ana comes in late; or Ana does not work hard) can become a problem and conflict between the two. His assumptions are based on his own definition of family, which could consist of any of the following: be responsible, show up on time, or working hard can bring in more money for the family. His assumptions are challenged when Ana receives the same bonus for a perceived different level of commitment.

As a leader, it is important to understand and identify to employees that most of us share the same values. It is our interpretation and expression of the values that creates the conflict. Many people justify bias and discrimination on the grounds of "values" without realizing that it is not the values themselves but the difference between our expression and interpretation and that of those we come into conflict with.

Assumptions

Our values are supported by our **assumptions** of our world. They are beliefs or ideas that we believe and hold to be true. They come about through repetition. This repetition becomes a habit we form and leads to habitual patterns of thinking and doing. We do not realize our assumptions because they are ingrained in us at an unconscious level. We are aware of it when we encounter a value or belief that is different from ours, when it makes us feel that we need to stand up for, or validate, our beliefs.

In the iceberg analogy, assumptions are underneath the waterline. They define for us, and give life or meaning to, objects, people, places, and things in our lives. Our assumptions about our world determine how we react emotionally and what actions we need to take. The assumptions about our world views guide our behaviors and shape our attitudes. Consider, for example, the following case study:

Kong grows up in SE Asia and has seen only males in leadership roles. Once he moves to the U.S., he assumes males are the only authority figures. Meanwhile his daughters, Sheng and Lia, who have grown up in the U.S. and were raised with access to education and resources learn that they can be leaders. In their professional work they are seen by their peers as leaders.

One day, at a celebration event that Sheng brings him to, Kong meets a White man who is her supervisor. He tells Kong, "Your daughter is a great leader. She's really helped us through this transition." He replies politely, "Thank you." Later, Kong shares with his wife, Ka, the story. He says, "I don't know why he thinks Sheng is a leader. Women are not leaders. Only men are leaders."

Symbols

Anthropologist Clifford Geertz (1973). believed that culture was a system based on symbols. He said that people use symbols to define their world and express their emotions. As human beings, we all learn, both consciously and unconsciously, starting at a very young age. What we internalize comes through observation, experience, interaction, and what we are taught. We manipulate symbols to create meaning and stories that dictate our behaviors, to organize our lives, and to interact with others. The meanings we attach to symbols are arbitrary. Looking someone in the eye means that you are direct and respectful in some countries, yet, in other cultural systems, looking away is a sign of respect. The meanings we attach to symbols can create a cultural

havoc when we meet someone who believes in a different meaning or interpretation; it can give us **culture shock**. This shock can be disorientating, confusing, or surprising. It can bring on anxiety or nervousness, and, for some, a sense of losing control.

While training senior managers in a leadership program, the issue of the organization's dress code came up in our conversation about differences. All the managers were in agreement that there was a dress code problem. It seemed to the managers that a couple of the employees were not abiding by the dress code policy. At this mid-size organization, the dress code was business casual, but a couple of the employees (the younger ones to be exact) came into work wearing t-shirts or dresses with thin straps. The managers were all confused as to why the dress code was so hard to follow for these two employees. It was obvious to them that business casual meant looking professional and neat, wearing clothes that were pressed and crisp. No matter how many times the dress code was explained to the staff, these two employees never changed.

In the training, we deconstructed the issue to understand what was really at play. The managers recognized that the dress code of "business casual" could mean several things if not explicitly stated in the policy. In fact, one manager said, "We keep saying that business casual is common sense, but our idea of common sense could be completely different from that employee's version of common sense." They also discovered that they did not want to be so explicit as to name every article of clothing that employees could and could not wear. They felt that being explicit would take away the feeling or the symbol that the office was a casual and relaxed environment; having policies that dictated everything that someone could or could not do would symbolize a different type of working environment.

As a result of this conversation, the managers recognized the tangible ways in which symbols are manifested in organizations. They became more mindful of the language and words used. They were more intentional about their behavior, now recognizing that each of their reactions or non-reactions is a symbol.

2.11 Value Dimensions of Culture

The work of Geert Hofstede, Hofstede (2001), while employed at IBM in the late 1960s to early 1970s, still stands as one of the most comprehensive studies of cultural values on leadership in the workplace. From his data collected from over 30 countries and 100,000 individuals, Hofstede created a model of value dimensions that speak to the ways that cultures tend to operate. Although this study is generalized to specific countries, his work on cultural value dimensions is helpful to any business doing global and multicultural work.

According to Hofstede, the five main dimensions are *identity*, *power*, *gender*, *uncertainty*, and *time*. You can think about cultural value dimensions on a scale or a continuum, where one aspect of the value lies on one side of the scale and the other extreme lies at the other end of the scale.

Table 2.2 Five Cultural Value Dimensions

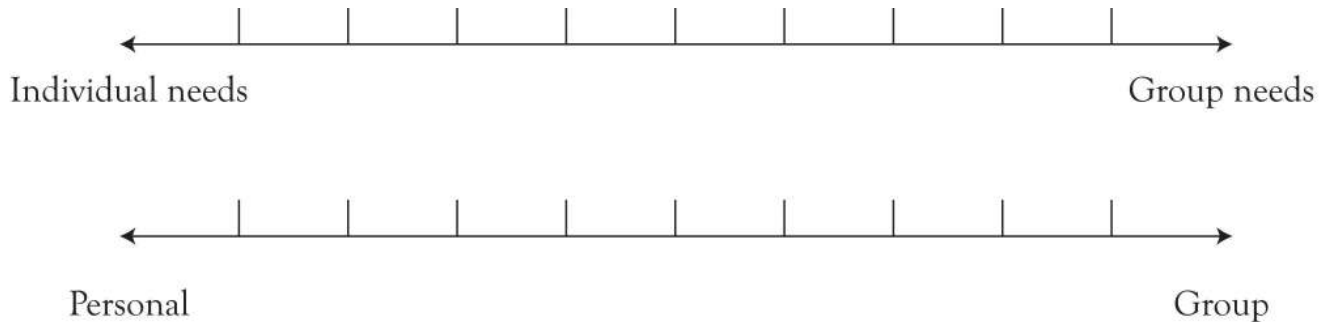
Value Dimensions	One Extreme	Other Extreme
Identity	Group	Individual
Power	Egalitarian	Hierarchal
Gender	Feminine	Masculine
Uncertainty	Ambiguity	Structure
Time	Relationship	Task

Cultural value dimensions help you to understand culture and to be able to make sense of culture. These dimensions provide you with a perspective of culture for yourself as well as a perspective of how others perceive their culture. All cultures experience these dimensions of difference in many ways, and different cultures solve these differences in many ways. Becoming aware of these concepts helps you to figure out the experiences you have in relation to your culture. It helps to make that experience less ambiguous and threatening. Cultural value dimensions provide clarity and a starting place for cultural awareness. However, they are often seen as intangible and under the waterline, but once you adapt to the cultural dimensions, you become more comfortable and do not see the cultural difference.

Identity

The value dimension of **identity** refers to the attention of groups or individuals toward group needs versus individual needs as well as toward individual achievement and interpersonal relationships. On a continuum, you see the identity value dimension expressed as such in Figure 2.5.

Figure 2.5 Dimension of Identity



On one spectrum, there is an expectation of doing things for the group rather than for oneself. On the other side, achievements and needs are individualized. Hofstede (2001) found that cultures placing a high value on individualism and a low value on collectivism valued individual rights; cultures placing a high value on collectivism valued relationships and harmony. This orientation, he argued, can have a large affect on managing organizations and people.

For example, in many Latino cultures, the concept of family, *la familia*, is critical to their cultural history and social systems. *La familia* is the most important social unit and includes extended family members. Decision making, conflict resolution, and negotiation are based on group needs rather than individual preferences; through paying attention to group and collective needs, harmony and relationships are intact. Alternatively, in individualistic cultures, the need of the individual comes first. U.S. culture teaches this to children at a young age. The following is an example that illustrates the differences between **individualist** and **collectivist cultures**:

Mary takes her eight year old, Johnny, to the store to buy ice-cream. She asks him to choose what ice-cream flavor he would like. Over time he learns to tell his mother about his personal likes and dislikes. Every time his mother responds to his decisions with encouragement. Over time he learns that he can and should be able to express himself.

By encouraging her child to make decisions and choices on his own, Mary raises a child that considers his personal needs and wants. If Johnny was in a group that operated more collectively, he might become quite upset when told that the whole group must agree to a specific ice cream flavor, that is, that his personal choice does not matter in the group decision.

The following is another example of individual and collective cultures:

A history teacher gives a lesson on the Bill of Rights to her students. She explains that everyone has individual rights and liberties. Sahara is a student in the class. She is thirteen years old and a recent immigrant from Somali. She learns that she has individual rights and to the disappointment and frustration of her parents, her behaviors begin to change at home. She comes home late from school, she stops doing her chores, and she talks back to her mother. She says, "I can do whatever I want. In this country, I am free!"

Sahara comes from a culture that is collective and tribal in nature. Her parents express confusion when they hear her say, "I can do whatever I want." They do not understand what she means and why she says what she says. They begin to think that she is losing her cultural values.

The following is another example that illustrates the value differences between collectivist and individualist cultures:

Tabitha is 22 years old and moves in with her college boyfriend, Randy, to an apartment near her parents. Tom and Susan, Tabitha's parents, are excited that she is able to be independent and to live on her own.

Xioli is Tabitha and Randy's friend from college. She is Chinese American and wants to move out of her parents' house. Randy and Tabitha have offered the second bedroom space for Xioli in their apartment. Xioli's parents think she is too young to live on her own. They also think it is a sign of disrespect to them if she, as a single woman, lives with a man.

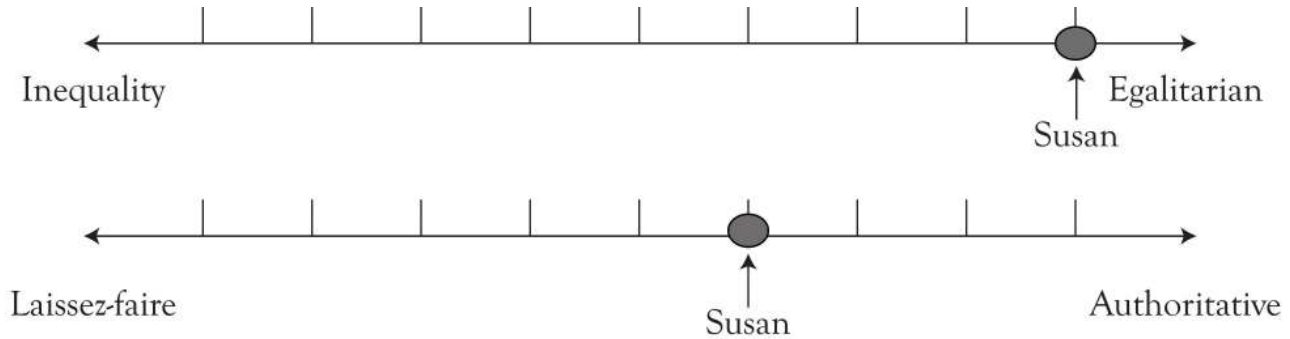
Power

Hofstede defined **power** distance dimensions as maintaining strict rules that establish the types of relationships individuals have with one another. Power represents the level of inequality and equality, as well as the level of hierarchy and upward mobility, within a cultural group. In regard to leadership, power dimension can also represent a culture's tendencies toward authority, on one end, and one's orientation toward laissez-faire leadership, on the other. Hofstede found that low-power-distance cultures emphasized equality and minimized power and status. The following is an example of this:

Susan is the president of a large manufacturing business. Although she is in a position of leadership and authority, she takes a "hands off management approach" to her employees, and in meetings provides a participatory, democratic engagement process.

Susan's dimension of power is illustrated in Figure 2.6.

Figure 2.6 Power Value Dimension



Gender

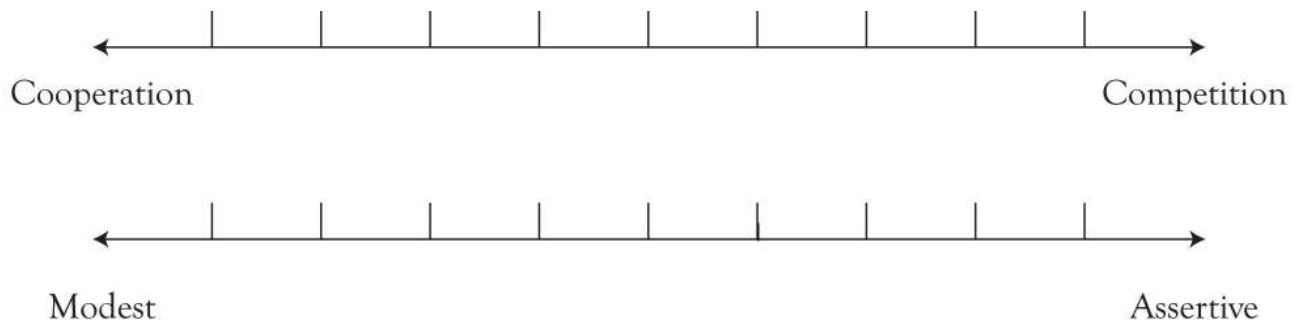
Hofstede (2001). describes the value dimension of **gender** as representing two paradigms of thinking and practice about the world in relation to traditional values associated with gender roles. Gender refers to the culture's tendencies or orientation toward enforcing or reinforcing masculine and feminine roles in work. Masculine cultures tend to emphasize ambition, control, competition, assertiveness, and achievement, whereas feminine cultures emphasize nurture, care, sharing, quality of life, and relationships. Sometimes these values are expressed as the "quantity of life" and the "quality of life."

In his findings, Hofstede indicated that cultures that rate high in masculinity, such as Japan, Austria, Venezuela, and Italy, revealed a high proportion of males in dominant structures; in low masculine cultures, such as Denmark, Norway, Netherlands, and Sweden, women were treated more equally in their social systems.

It is important that you recognize that these values are not associated with being male or female. In other words, this does not mean that men cannot be part of feminine cultures or that women do not orient themselves toward "masculine" cultural values. Finally, like other value dimensions, gender dimensions can vary greatly within any culture.

You can think about the value dimension of gender in the ways displayed in Figure 2.7.

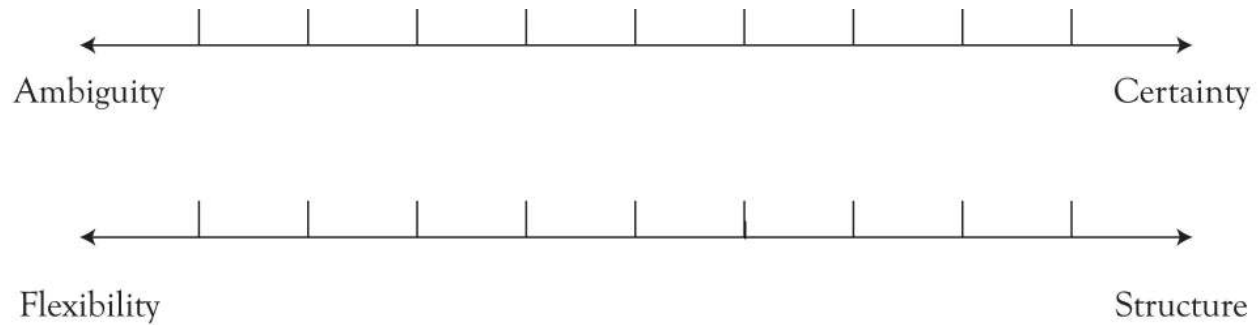
Figure 2.7 Gender Dimensions



Uncertainty

The dimension of **uncertainty** emphasizes cultures that are either oriented toward uncertainty or toward creating certainty and stability. Hofstede described this as a society's tolerance for ambiguity. Hofstede (2001). Societies that are in *high uncertainty avoidance* are rule-bound and pay more attention to written procedures, rules, or goals. Individuals who have a higher need for formalized structures, procedures, or diplomacy tend to minimize their uncertainty levels in order to cope with the unknowns of their situations. Someone who is on the other extreme of the dimension is more relaxed about the rules and procedures; they are more flexible in their attitudes toward rules and policies. The value dimension can be expressed in the ways shown in Figure 2.8.

Figure 2.8 Uncertainty Value Dimension



This dimension also speaks to a culture's orientation toward directness and honesty. Edward Hall (1981), popularized the terms "high-text" culture and "low-text" culture to describe cultural differences between two different types of societies. The ideas are often used to describe the ways in which cultures communicate and to understand what cultural constructs underlie the communication.

High-context cultures are societies in which people often make inferences; they leave things unsaid, knowing that the other person would understand what was implied in the communication. People in these societies tend to rely on groups for support. Low-context cultures are societies that are explicit and direct in their communication. They generally are more comfortable relying on themselves, as individuals, and working out solutions to problems. Like high-context cultures, relationships are important to low-context societies; the difference is in the longevity of the relationships. Generally, low-context societies have many relationships that are less intimate and close than those of high-context cultures.

Both types of cultural differentiations are illustrated in Table 2.3.

Table 2.3 High and Low Context Culture Descriptors

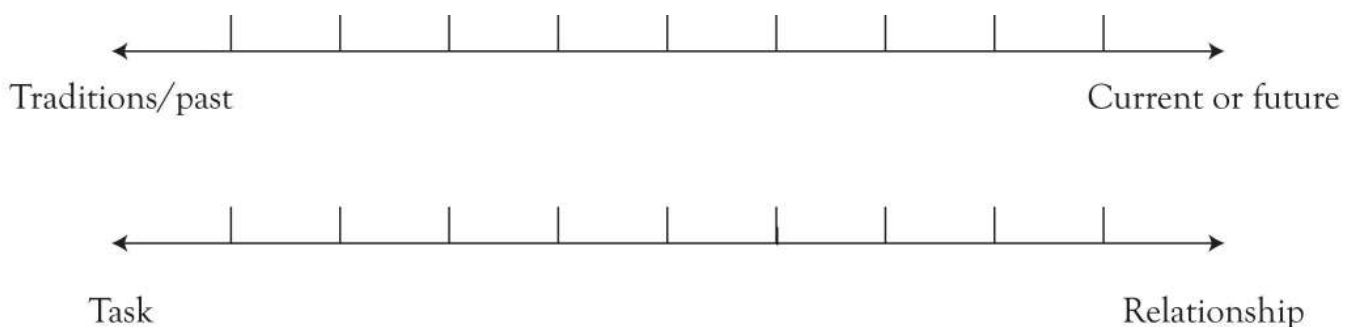
Cultural Context	Countries/Cultures	Descriptors	How They Perceive the Other Context
High context	Spain	• Less verbally explicit communication • Implied meanings • Long-term relationships • Decisions and activities focus around personal, face-to-face relationships	Low-context cultures are... • relationship-avoidant • too aggressive • focused too much on tasks and goals
	Mexico		
	Greece		
	Middle East		
	China		
	Japan		
	Korean		
	Thailand		
Low context	United States	• Rule-oriented • Knowledge is public and accessible • Short-term relationships • Task-centered	High-context cultures... • are too ambiguous • are quiet and modest • ask a lot of questions
	Germany		
	Great Britain		
	Australia		

Time

The dimension of **time** speaks to how communities are oriented toward space and time, including their tendencies toward traditions and the past, and their orientation toward the future and the present. In many cultural systems, holding on to traditions is important in current day-to-day operations and relationships. Some societies will refer to traditions to preserve and maintain cultural norms, that is, to protect what currently exists.

Time is also a reference to a culture's orientation toward tasks or relationships. For example, a manager from the United States who travels to India to negotiate a business contract needs to know that meetings will occur whenever people show up to the meeting, which could be hours after it is scheduled. A task-oriented leader is certain to be frustrated when he meets up with an Indian who is more time-oriented toward relationships. In the American perspective, promptness is professionalism; yet, in the other perspective, the concept of time is more loose and flexible. The value of time is illustrated in Figure 2.9.

Figure 2.9 Time Value Dimension



Understanding these five value dimensions and their impact in different cultural systems will be helpful to your work in cultural intelligence. Like any cultural model, you need to recognize that cultural factors in leadership and organizations, as indicated by Taylor Cox, differ “across gender, nationality, and racial/ethnic groups as it relates to time and space orientation, leadership style orientations, individualism versus collectivism, competitive versus cooperative behavior, locus of control, and communication styles.”Cox (1994), p. 108. You must recognize that *microcultures* exist within *macrocultures*; this is significant in working effectively on a cross-cultural level.Cox (1994), p. 106.

2.12 Culture and Leadership

What is the importance of understanding cultural value dimensions in businesses? Like other cultural systems, organizational culture controls the behavior, values, assumptions, and beliefs of organizational members. It is a combination of organizational members' own beliefs and the values, beliefs, and assumptions of the organization. It is the role of the organizational leader, as a change agent, to help create a positive organizational culture that meets the demands of a competitive environment, board and shareholder expectations, and employee career satisfaction.

Since the mid-1990s, the **Global Leadership and Organizational Behavior Effectiveness (GLOBE)** House, Hanges, Javidan, Dorfman, & Gupta (Eds.) (2004). research of 62 societies has served as a significant study for understanding how cultural value dimensions are expressed in different cultures—whether societal or organizational. Knowledge and awareness of cultural values can enable leaders and managers to effectively manage and work through intercultural conflict and interactions. Over 17,000 managers from 951 organizations in 62 societies participated in focus groups, questionnaires, and interviews for this study.

Cultural Value Dimensions

The GLOBE study found that nine core dimensions of cultures exist in different societies. The first six dimensions in the chart below originated from the cultural value dimensions Geert Hofstede proposed in the 1980s. Table 2.4 lists other dimensions, as well as their definitions, as described in the GLOBE study. House & Javidan (2004), pp. 11–13.

Based on the responses generated by the study and using other research, the GLOBE researchers grouped societies into regional clusters. The clusters were a way of creating meaning around societal views of culture and leadership. Each cluster had characteristics specific to their region, language, religion, history, and shared cultural understanding. Table 2.5 and Table 2.6 lists each cluster and the countries that were grouped into the clusters.

Leadership Behaviors and Culture

The findings of the GLOBE study served to help organizations and societies understand what made an effective or ineffective leader. Many leadership behaviors are similar across societies, pointing out that no matter the cultural difference or society in which a leader is from, there are specific leadership behaviors that are viewed as effective. The GLOBE project was significant in indicating how cultures perceive effective and ineffective leadership, which is helpful to leaders in facilitating intercultural interactions.

The study revealed six global leadership behaviors, which were used in the study to understand how the clusters perceived leadership. These six are charismatic/value-based, team-oriented, participative, humane-oriented, autonomous, and self-protective. Using their understanding of leadership behaviors and perceptions of leadership from each cluster group, the researchers were able to identify a leadership profile for each cluster. Table 2.7 and Table 2.8 list the six leadership behaviors and their characteristics as well as the leadership profile for each cluster.

Table 2.4 Cultural Dimensions as Researched in the GLOBE Study

Globe Dimension	One Extreme	Other Extreme
Uncertainty avoidance	Need for established social norms, rituals, and practices	Comfortable with ambiguity and predictability
Power distance	Egalitarian and nonhierarchical	Hierarchy, authority, disparity in status and wealth
Institutional collectivism	Collective actions and sharing of resources encouraged	Individual actions and goals are encouraged
In-group collectivism	Expressions of pride, loyalty, and cohesion	Noncohesiveness, loyal to oneself and one's needs
Gender egalitarianism	Nurture, care, relationships, sharing	Ambition, assertiveness, control
Assertiveness	Assertive, confrontational, and aggressive in social relationships	Timid, submissive, and tender in social relationships
Future orientation	Planning, investing, and delays of individual or collective gratification	Spontaneity, enjoying the present
Performance orientation	Encourages and rewards group performance and excellence	No rewards and encouragement for goals; more relaxed in terms of achievement
Humane orientation	Encourages and rewards individuals for being fair, altruistic, friendly, generous, caring	Concerns for self, not sensitive, not encouraging of social supports and community values

Adapted from House et al. (2002) The GLOBE Study of 62 Societies, Thousand Oaks, CA: Sage.

The study also highlighted the perceptions of cultures related to universally desirable and undesirable attributes in leaders. The desirable attributes were viewed as characteristics that were valued and that facilitated the leadership processes. Undesirable attributes were viewed as obstacles and challenges to effective leadership. Table 2.9 illustrates the positive and negative attributes of effective leadership.

Table 2.5 GLOBE Clusters of Societies

Cluster	Countries
Anglo	Canada, United States, Australia, Ireland, England, South Africa (White sample), New Zealand
Confucian Asia	Singapore, Hong Kong, Taiwan, China, South Korea, Japan
Eastern Europe	Greece, Hungary, Albania, Slovenia, Poland, Russia, Georgia, Kazakhstan
Germanic Europe	Austria, The Netherlands, Switzerland, Germany-East, Germany-West
Latin America	Ecuador, El Salvador, Colombia, Bolivia, Brazil, Guatemala, Argentina, Costa Rica, Venezuela, Mexico
Latin Europe	Israel, Italy, Switzerland (French-speaking), Spain, Portugal, France
Middle East	Turkey, Kuwait, Egypt, Morocco, Qatar
Nordic Europe	Denmark, Finland, Sweden
Southern Asia	Philippines, Indonesia, Malaysia, India, Thailand, Iran
Sub-Saharan Africa	Zimbabwe, Namibia, Zambia, Nigeria, South Africa (Black sample)

Adapted from House et al. (2002) The GLOBE Study of 62 Societies, Thousand Oaks, CA: Sage

Table 2.6 Clusters of Societies and their Cultural Value Dimensions

Cultural Dimension	High-Score Cluster	Low-Score Cluster
Uncertainty avoidance	Germanic Europe	Eastern Europe, Latin America
	Nordic Europe	Middle East
Power/hierarchy	No Clusters	Nordic Europe
Institutional collectivism	Nordic Europe	Germanic Europe, Latin America
	Confucian Asia	Latin Europe
In-Group collectivism	Confucian Asian, Eastern Europe	Anglo, Germanic Europe
	Latin America, Middle East Southern Asia	Nordic Europe
Gender	Eastern Europe	Middle East
	Nordic Europe	

Adapted from House et al. (2002) The GLOBE Study of 62 Societies, Thousand Oaks, CA: Sage

Table 2.7 GLOBE Study of Key Leadership Behaviors

Dimension	Behaviors
Charismatic/value-based leadership	Inspires others, motivates, expect high performance; visionary, self-sacrificing, trustworthy, decisive
Team-oriented leadership	Team-building, common purpose, collaborative, integrative, diplomatic, not malevolent
Participative leadership	Participative and not autocratic; inclusive of others
Humane-oriented leadership	Supportive, considerate, compassionate and generous; modesty and sensitivity
Autonomous leadership	Independent and individualistic; autonomous and unique
Self-protective leadership	Ensures the safety and security of the leader and the group; self-centered, status conscious, face-saving, conflict-inducing

Adapted from House et al. (2002) The GLOBE Study of 62 Societies, Thousand Oaks, CA: Sage

Business leaders have tremendous power to change the organizational culture by utilizing several methods that address the underlying assumptions, beliefs, and values of its members; however, this is not an easy task. Culture, as explained, is oftentimes manifest in unconscious behaviors, values, and assumptions that develop over time and change as new employees enter an organization. The significance of the GLOBE study is that it helps leaders to understand the role of culture in leadership. By understanding one's culture, as well as that of others, it brings you to awareness of different perceptions of leadership and how cultures come to understand leaders. Recognizing the elements in leadership and culture enables you to leverage the differences that cultures create and to use that to create positive intercultural growth.

Table 2.8 Leadership Behavior Profiles for Clusters

Cluster	1st	2nd	3rd	4th	5th	6th
Eastern Europe	Autonomous	Self-protective	Charismatic	Team Oriented	Humane	Participative
Latin America	Charismatic	Team	Self-protective	Participative	Humane	Autonomous
Latin Europe	Charismatic	Team	Participative	Self-protective	Humane	Autonomous
Confucian Asia	Self-protective	Team	Humane	Charismatic	Autonomous	Participative
Nordic Europe	Charismatic	Participative	Team	Autonomous	Humane	Self-protective
Anglo	Charismatic	Participative	Humane	Team	Autonomous	Self-protective
Sub-Sahara Africa	Humane	Charismatic	Team	Participative	Self-protective	Autonomous
Southern Asia	Self-protective	Charismatic	Humane	Team	Autonomous	Participative
Germanic Europe	Autonomous	Charismatic	Participative	Humane	Team	Self-protective
Middle East	Self-protective	Humane	Autonomous	Charismatic	Team	Participative

Adapted from House et al. (2002) The GLOBE Study of 62 Societies, Thousand Oaks, CA: Sage

Table 2.9 List of Desirable and Undesirable Leadership Attributes from the GLOBE Research

Desirable Leadership Attributes	Undesirable Leadership Attributes
Trustworthy	Loner
Just	Asocial
Honest	Noncooperative
Foresight	Irritable
Plans ahead	Nonexplicit
Encouraging	Egocentric
Positive	Ruthless
Dynamic	Dictatorial
Motivational	
Builds confidence	
Intelligent	
Dependable	
Team builder	
Communicator	

Adapted from House et al. (2002) The GLOBE Study of 62 Societies, Thousand Oaks, CA: Sage

2.13 Chapter Summary

- Culture is comprised of both tangible and intangible things you see, hear, feel, and perceive. It consists of the shared beliefs, values, and assumptions of a group of people who learn from one another and teach to others that their behaviors, attitudes, and perspectives are the correct ways to think, act, and feel.
- Culture is a process of learning and sharing, and it is dynamic and symbolic.
- Cultural issues are systemic and understanding this helps leaders to appreciate culture in its fullest sense.
- Awareness helps to eliminate the stereotypes that are derived from cultural misunderstandings, which limit the positive ways in which culture is viewed. However, generalizations about cultures can help serve as a framework for interacting with unfamiliar cultural systems.
- Culture is multidimensional, consisting of multiple layers. There are five main levels—national, regional, organizational, team, and individual—that are most useful in cultural contexts.
- Each cultural layer, when peeled apart, reveals the “roots” of culture, which consist of the values, assumptions, and symbols of the culture. These three ground cultural systems, often making it hard for cultural shifts to occur.
- Familiarity with Hofstede’s model of value dimensions (identity, power, gender, uncertainty, and time) in the workplace helps leaders to realize the impact of values and beliefs in cultural settings.
- The GLOBE study of 62 societies is the most comprehensive research, to date, that analyzes how leadership is perceived by cultures.
- Nine cultural value dimensions, including the five proposed by Hofstede in the 1980s, illustrate the importance of understanding value dimensions in the context of leading.
- There are six global leadership categories that emerged from the GLOBE data: charismatic, team-oriented, participative, humane-oriented, autonomous, and self-protective.
- The GLOBE data points to universally positive and undesirable attributes of leaders. All cultures agree that the following are negative attributes: a leader who is a loner, irritable, ruthless, asocial, nonexplicit, dictatorial, noncooperative, and egocentric.
- Leaders have a role in creating business cultures that make employees feel valued and included regardless of their cultural backgrounds.

Source: “Leading with Cultural Intelligence: Understanding Culture”, Saylor Academy, 2012.

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3.2: READ- Culture Guide

[Culture Guide from HR Brew.](#)

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3.3: READ- Building Workplace Culture in a Virtual Environment

Building Workplace Culture in a Virtual Environment

Can technology adequately support company culture in a hybrid or remote work environment? That's the question being asked by HR stakeholders now that virtual work is here to stay and tech companies are introducing new features to address the lack of in-office spontaneity that can encourage free-flowing creativity while staving off employee burnout.

Since the pandemic began, company culture has been under pressure. The Great Resignation, 1 million U.S. deaths from COVID-19, racial injustice and the fight for union representation at several prominent organizations are just some of the societal trends that have raised workers' concerns and suspicions about how far companies will go to support their employees.

At the same time, a new wave of technological advancements has introduced new opportunities to capture workers' behaviors, their patterns of thinking and their sentiments. Chief among those technologies is artificial intelligence.

Machine learning allows the technology to adapt to the individual, as opposed to previous "big data" tools that required workers to adapt to the technology, observed Paul Rubenstein, chief people officer at Visier, a people analytics company headquartered in Vancouver, British Columbia, Canada.

"We have to start seeing ourselves in the technology," he said. "I don't think it's about technology replacing human interaction. I think it's about us using the technology to its fullest rather than being constrained or trapped by the technology and the way someone else designed it," Rubenstein said.

He added that a shift has occurred in the types of data that companies can collect on employees. Employers long have collected data such as when employees started their day, what they are working on and how many hours they worked, but this kind of data is not enough to effectively create a positive work experience, especially in the virtual work world.

"Employees should be able to look at data and see that they are not connected to enough people or they only talk to the same people or they are isolated," Rubenstein said. "People need to see themselves in the data because it holds a mirror up to them. That's the first big shift. We have to have data gathering and data dissemination that helps everyone see a more human truth."

Using employee data to make decisions will be critical for employers as they figure out the best way to improve the remote-worker experience, especially if employers want to raise engagement and get the best performance from their employees.

In a survey conducted by Workday, 268 HR leaders were asked to rank the most important issues that they think will accelerate digital transformation across the wider business: 50 percent cited positive employee experiences as the most important issue. In second place, 45 percent of respondents said an increased focus on diversity, equity and inclusion is the most important.

To create positive experiences, technology companies are focusing on providing digital solutions that collapse the distance between employees and employers and digitize the aspects of work that occur during those unstructured, spur-of-the-moment encounters. The aim is to incorporate human behavior into their software.

For example, Zoom has added gesture recognition features that allow users to raise their hands or give a thumbs-up when users want to express their feelings without interrupting the speaker.

Salesforce's Slack recently introduced huddles, an audio-only conversation feature that the company says is designed to re-create—to the extent that technology can—the spontaneity of a quick in-office watercooler-type meeting or a pause at a colleague's desk to ask a question. The tool can also be used to help re-create a physical space where entire teams can convene, like marketing teams that often work together throughout the day.

Oracle recently introduced the Oracle ME (My Experience) platform, which consists of six modules that target corporate culture. The tools offer workflow guidance to help workers complete professional and personal activities ranging from onboarding or transferring to a new role to getting married or having a baby.

Additionally, Oracle ME makes it easier for employees to foster continuous engagement between employees and managers. The platform also helps to keep the workforce informed of changes, reinforce organizational culture and nurture connections among employees. This ultimately enhances workplace belonging and development.

According to Zachary Chertok, research manager in employee experience at Needham, Mass.-based International Data Corp., when employers think about elements of the physical workplace, they have to consider how they'll equip both the organization and its employees with the tools to stay connected, engaged, collaboratively innovative and creative in problem-solving, regardless of the employees' work environment.

Employees, Chertok said, have to think about how they can work in a way that lets them set the pace, tone and equation for what work/life balance means for them.

"We are in an age where, at a strategic level, we are looking at the role that technology and, to a slightly lesser extent, data and prescriptive services plays in guiding organizations to that personal equity," Chertok said.

He added, "It's no longer about one policy for everybody. It's about, 'Where can we introduce flexibility within the job and office and work requirements at the role level and at the personal level?' and making sure that those resources and choices are as equitably distributed as possible."

In the effort to grow a company culture that will thrive in the remote and hybrid work model, Rubenstein said, technology will have to do a better job of capturing and managing the kinds of spontaneous experiences that employees have with each other in traditional office environments.

"We need digital technologies that see how employees interact so that we can create an actual map of interactions and make sure that we are not leaving the best people behind," Rubenstein said.

Nicole Lewis is a freelance journalist based in Miami.

Source

- Nicole Lewis, "Building Workplace Culture in a Virtual Environment", SHRM, June 21, 2022.

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3.4: READ- 3 Key Metrics for Culture

3 Key Metrics for Company Culture

This quarter I've been focused on different aspects of culture from what it is to what can impact your company culture.

I wanted to wrap up with how to measure your culture.

Is it even possible to measure culture? Yes and no.

Measuring culture can be complicated because:

- It's subjective: your employees may interpret culture differently. What helps is having a commonly known definition of culture.
- It's complex: as you've read this quarter culture is complicated! There are so many things that can influence culture that distilling it down into a couple of metrics can feel impossible.
- It's dynamic: culture is not a moment in time thing, it's dynamic. It can change as an industry, organizational structure or even leaders evolve.
- It's not standardized: organizations use different tools, approaches, or surveys to measure culture. That makes it difficult to compare to other organizations with benchmarks.

But that doesn't mean you shouldn't try to measure your culture.

Measuring your culture can:

- Help you uncover areas of improvement
- Gain alignment with organizational goals
- Help you create a more engaged culture

Here are 3 metrics to consider when thinking about your culture:

1. Turnover
2. Engagement
3. eNPS

I'd recommend you consider a mix of qualitative and quantitative data, leveraging multiple sources of data and regularly revisiting how, what and why you collect this data.

#1: Turnover

When thinking about measuring culture I always think about turnover data.

Why?

Because if employees are leaving your organization in waves there might be something wrong with your culture.

Cough it could be toxic cough.

3 important parts of turnover:

Who is leaving? Top performers leaving can be detrimental to a business and your culture! On the flipside, low performers leaving may actually help your culture.

When are they leaving? You should know the different inflection points of when employees are leaving. If you have a significant amount of employees leaving within 90 days you may have problems in your recruiting and onboarding process. If more folks are leaving around the 2 year mark maybe there's a problem with growth at the organization.

Why are they leaving? Enter exit interviews! Exit interviews are full of so much juicy information and can help you uncover so much. If employees are consistently citing the same thing (ex: compensation) then you know where you can focus! The bottom line: turnover can teach you SO MUCH about your culture and help you uncover factors that could be impacting your culture.

#2: Engagement

A definition: employee engagement is the emotional and mental connection that employees feel towards their place of work.

The relationship between culture and employee engagement?

Culture drives employee engagement.

If you have a supportive culture your engagement will be higher. On the flipside if your culture is awful you may find your employees disengaged.

So, how do you measure engagement?

Before we get to that I have to note: engagement, like culture, can be difficult to measure because it depends on a lot of nuanced factors (like emotion) and collection is often inaccurate when relying on traditional modes.

To design and get the best engagement data there are a few moving parts:

- Insightful surveys
- Max employee participation
- Collection & analyzing data
- Designing action plans / initiatives
- Implementing action plans

TBH, working on engagement is like a full time job!

There are a lot of tools out there that can help out of the box.

The bottom line: if your employee engagement is low then that's an indicator there is a cultural problem somewhere.

Digging into the data and putting together action plans is a great place to start.

#3:eNPS

I have a love/hate relationship with eNPS. *Shocker to no one.*

What is eNPS?

eNPS = employee net promoter score.

Net promoter score (NPS) was used to measure customer loyalty and experience and it was adapted to discover the same for employees.

It's a simple question: On a scale of 0-10, how likely are you to this organization as a place to work to others?

Breaking it down:

- 9 or higher are considered promoters (engaged employees)
- 7 or 8 are considered neutral
- 0 to 6 are considered detractors (disengaged)

Why I love: it's only one question so usually employees will answer, it's easy to continuously measure, and you can benchmark compared to other organizations (above 80 is considered world class).

Why I hate: it's limiting and doesn't really tell you much about what you can fix.

The bottom line: I will always leverage eNPS with other surveys and data.

Wrapping it up:

Now, you hopefully have a few ways to think about measuring your culture.

My biggest tip: ALWAYS leverage multiple sources of data and don't forget observations can be powerful!

If you feel like the vibes are off (as the kids would say) it could be an indicator to dig deeper into your culture.

Next week, I'll give a brief recap of what we learned at the workshop and what's coming up the rest of the year for I Hate it Here.

To be continued...

Source

- Hebba Youssef, "[3 Key Metrics for Culture](#)." September 25, 2023.

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3.5: READ- Employee Net Promoter Score (eNPS)

Employee Net Promoter Score (eNPS)

What is eNPS (Employee Net Promoter Score)?

An Employee Net Promoter Score, or eNPS, is a scoring system that measures employee satisfaction. It is based on the Net Promoter Score system, which gauges customer loyalty.

Like NPS, the eNPS system consists of a question asking employees to rate, on a scale from zero to ten, how likely they are to recommend the organization as a place to work.

The system generates a score first by sorting ratings into three categories:

- Promoters
- Passives (also called "neutrals")
- Detractors

The ratings are tallied, and the percentage of detractors is subtracted from the percentage of promoters. The resulting number represents the organization's Employee Net Promoter Score, or how employees feel about working for their company. eNPS scores can range from +100 (mostly promoters) to -100 (mostly detractors).

An effective eNPS survey takes steps to ensure provide honest feedback. employee anonymity so employees can

Employees Want to Be Heard. Is Your Organization Listening?

With accurate, reliable employee surveys in BambooHR, you'll gain the insight you need to prevent burnout, improve morale, and stop premature turnover in its tracks.

Employee Net Promoter Scores

There are different ranges of scores for eNPS—keep these in mind when reviewing your data.

Promoters (Score: 9–10)

A promoter is an employee who's a highly engaged, satisfied individual, very likely to recommend your organization as a place to work. These individuals contribute positively to the organization's image and growth. Additionally, they are motivated and inspired by the company culture, which empowers them to deliver high-quality, top-tier work.

Organizations with many promoters likely have a positive culture that attracts high-quality talent.

Passives (Score: 7–8)

Passives, also called neutrals, are employees who are satisfied enough to be content but may not be entirely engaged. These individuals are likely to consider offers from outside companies and may not recommend the organization to their network. However, it's important to note that not all passives speak negatively about the company.

This range of eNPS scores may provide insight into where neutrals can be transformed into promoters. For example, neutrals who are unsatisfied with healthcare benefits or development may become promoters if these perks are improved.

Detractors (Score: 6 or Below)

Detractors are unlikely to recommend their organization when answering the eNPS questions, which may indicate employee dissatisfaction—even if that score is a six. Because detractors are dissatisfied at work, they may leave the organization, so leaders need to take immediate action to stop this.

It's crucial to gather and evaluate detractor feedback to minimize turnover and associated costs. For positive results, employers can assume every employee feels the same and take rapid action to remedy the problem.

What are the benefits of an eNPS Survey?

While many employee satisfaction metrics can feel intangible, eNPS is simple, easy to acquire, and easy to understand. It's an excellent way to compare a company against its competitors. Organizations can also use the results to understand how their

employees feel and what may detract from their

Tracking keywords (such as employee's experiences, salary, work-life balance, or leadership) that promoters and detractors use can help identify areas for improvement, whether in a specific department or in the organization.

A well-prepared organization will survey employees with eNPS regularly—whether monthly, quarterly, annually, or otherwise—to stay updated and track trends over time. Comparing progress over the years will help companies improve. As eNPS improves, scores can be included in recruiting materials to attract a higher caliber of talent to their workforce.

What is a Net Promoter Score (NPS)?

A Net Promoter Score (NPS) measures how loyal customers are to a company and is a common metric used in customer experience programs. Scores are usually measured with a two-question survey and reported with a number ranging from +100 to -100. The higher the score, the more loyal customers are to your brand and the more likely they are to recommend your products or services to friends and family.

NPS scores are calculated similarly to eNPS scores, with customers segmented into promoters, neutrals, and detractors. Higher scores (9–10) mean customers are highly satisfied with your company, while lower scores (6 or below) represent highly dissatisfied customers who will likely dissuade others from buying your products/services.

NPS vs eNPS: How do they compare?

Both NPS and eNPS are used to measure satisfaction, loyalty, and engagement. While they seem very similar upfront, there are key differences between them, which are broken down below:

Similarities

- Both metrics measure satisfaction rates
- NPS and eNPS use a two-question survey to gather feedback
- Both are easy to understand and simple to measure
- The metrics help surveyors understand where improvements are needed

Differences

- NPS surveys are typically sent to customers, while eNPS is used to measure employee satisfaction rates
- NPS asks customers whether they'd recommend a product to friends and family; eNPS determines whether employees would recommend the company to friends and family as a good place to work
- NPS is typically connected with a specific customer and their data history within the company; eNPS surveys are usually anonymous

Though NPS and eNPS measure satisfaction rates from different groups, the scores are often correlated. Gallup's employee engagement assessment analyzed the relationship between employee engagement and performance outcomes and found that customer satisfaction increases by 10% in businesses with engaged employees. A company with a high NPS probably also has a high eNPS, while a company with a low NPS might also have a low eNPS.

Net Promoter, NPS, and the NPS-related emoticons are registered U.S. trademarks, and NetPromoter Score and Net Promoter System are service marks, of Bain & Company, Inc., NICE Systems, Inc. and Fred Reichheld. 3

Source

- "Employee Net Promoter Score (eNPS)," BambooHR. HR Glossary.

This page titled [3.5: READ- Employee Net Promoter Score \(eNPS\)](#) is shared under a [not declared](#) license and was authored, remixed, and/or curated by [Mabel Gehrett](#).

3.6: REVIEW- Workplace Culture graphic

The State of Global Workplace Culture in 2023

An International Model for Building Better Workplaces

Does a positive workplace culture still matter to employees around the world? Should employers continue to invest in workplace culture as an essential tool for retaining and empowering employees globally?

A SHRM Research survey of 11,080 workers across 15 countries shows that the answer to both questions is YES!



The Global Workplace Culture Model

Regardless of the country where they work, employees' workplace culture perceptions are shaped by five key dimensions.

Equitable Leadership Practices	Career Fulfillment	Good Manager Communication	Work/Life Integration	Respectful Workplace Interactions
☐ Fair performance evaluations. ☐ Ability to make a complaint about a leader without punishment. ☐ Appreciation of employees' unique backgrounds, perspectives and experiences. ☐ Active solicitation of employee feedback by the organization. ☐ Transparent communication from leadership.	☐ Opportunities for career growth. ☐ Employees' pride in their work. ☐ A meaningful career.	☐ Manager seeks employee input before making decisions. ☐ Employee has frequent candid/open conversations with manager. ☐ Employee can trust what the manager says.	☐ Ability to balance work and home commitments. ☐ Not feeling exhausted at end of workday. ☐ Not irritable at home due to workplace culture. ☐ Reasonable workload.	☐ Absence of identity-based slights or microaggressions. ☐ Absence of inconsiderate manager behavior. ☐ Absence of inconsiderate co-worker behavior. ☐ Absence of unfair treatment based on identity.

A Positive Culture Increases Commitment and Job Satisfaction and Lowers Intent to Quit Globally

Employees who rate their organization's culture as "good" or "excellent" (vs. "poor" or "terrible") are:



more likely to feel satisfied at work.



less likely to dread going to work.



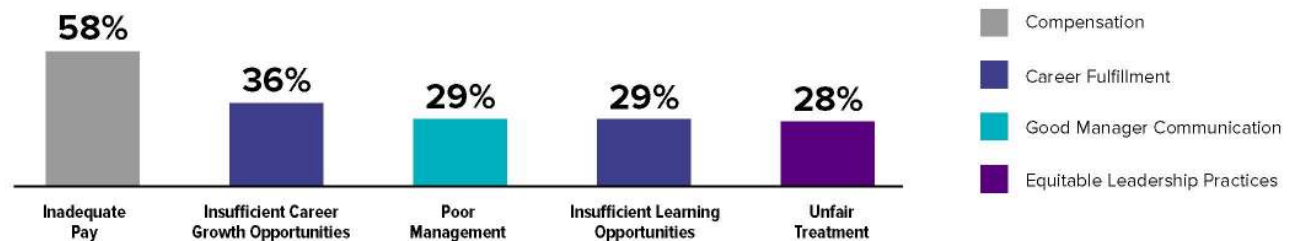
less likely to be actively looking for a new job.



less likely to have actively looked for a new job in the last six months.

Four of the Top Five Reasons Why Employees Look for a New Job Have to Do With Workplace Culture

Top five reasons why employees worldwide plan to leave their employer
(% of responses among active job hunters; participants could select more than one reason)



Globally, What Can Employers Do? Take These Three Actions to Foster a Positive Culture

1
Build a foundation of equitable leadership practices.

High equity makes employees ...
19x more likely
to rate their workplace culture as "good" or "excellent."

2
Create meaningful careers.

High career fulfillment raises ...
job satisfaction by
12x
&
organizational commitment by
4x

3
Focus on these three practices:

- Transparent communication from leadership.
- Fair performance evaluations.
- Work that employees can feel proud of.

Methodology

A sample of 11,080 participants from 15 countries was recruited using a third-party online panel between December 2022 and April 2023. Participants were equally balanced by gender and ranged across all age groups and generations. The participants worked for organizations of all sizes and ranged in tenure with the organization from less than one year to more than 10 years. Most participants were either individual contributors or front-line managers, but a small number of high-level executives also took part.

To learn more, please read the full 2023 Global Workplace Culture report [here](#).

*Based on relative risk ratios obtained from predicted probabilities of binary logistic regression models on each outcome while controlling for social desirability and acquiescence (weighted by country size). Predicted probabilities were obtained at average levels of social desirability and acquiescence.



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3.7: REVIEW- Top 10 Culture Killers

THE TOP TEN CULTURE KILLERS... AND WHAT TO DO ABOUT THEM!

"The single, greatest advantage any company can achieve is organizational health."
Patrick Lencioni, The Advantage

A LACK OF LEADERSHIP



1

An Unhealthy Ego

WORK TO UNCOVER PERSONAL BLIND SPOTS. INVEST IN A COACH. ALLOW YOURSELF TO BE VULNERABLE AND ASK FOR FEEDBACK FROM YOUR TEAM.



2

A Lack of Vision

LEVERAGE SENIOR LEADERS TO HELP ESTABLISH THE VISION. IF YOU DON'T KNOW WHERE TO START, GET HELP FROM A PROFESSIONAL!



3

Unhealthy Competition Between Departments

UNDERSTAND THE "TEAM ONE" CONCEPT AND THAT DEPARTMENT LEADERS MUST PRIORITIZE THE LEADERSHIP TEAM OVER THE TEAM THEY MANAGE.

INEFFECTIVE COMMUNICATION



4

Lack of clear, transparent, direct communication

INVEST IN COMMUNICATIONS AND TEAM DEVELOPMENT TRAINING. BUILD TRUST, PROVIDE HEALTHY CRITICAL FEEDBACK, AND IMPLEMENT SYSTEMS TO MINIMIZE MISCOMMUNICATION.

These cultural challenges are very dynamic, and we constantly need to be working at them to keep them at bay. This requires a proactive approach through structure, tools, and regular checkpoints. Improvement is contingent on a commitment from leadership that this is "how we operate," as opposed to "let's figure out how to fix this."

THE TOP TEN CULTURE KILLERS... AND WHAT TO DO ABOUT THEM!

FEAR/RESISTANCE TO CHANGE



5 An Unwillingness To Change

DEVELOP A "CULTURE COMMITTEE" TO SUPPORT WORK-LIFE BALANCE AND ENHANCE WORK ENVIRONMENTS. USE PROJECT TEAMS TO MORE CHANGE FORWARD.



6 Inflexible or Outdated Policies and Technology

AMEND CURRENT UNPRODUCTIVE POLICIES QUARTERLY. PROMOTE THE NEW POLICIES TO CURRENT AND PROSPECTIVE TEAM MEMBERS, AND ULTIMATELY, THE PUBLIC.



7 Insufficient Employee Development Opportunities

COMPLETE CAREER PATHING FOR EMPLOYEES. ESTABLISH A BUDGET FOR TRAINING AND DEVELOPMENT. BUILD A TRAINING ROADMAP FOR INDIVIDUALS. PROVIDE ONLINE RESOURCES.

A LACK OF ACCOUNTABILITY AND EFFECTIVE RECOGNITION



8 Ineffective Performance Management

QUANTIFY THE IMPACT. COMPLETE FIVE DYSFUNCTIONS OF A TEAM WORKSHOPS. CREATE ACCOUNTABILITY SCRIPTS. TIE CORE VALUES TO PERFORMANCE EVALUATIONS.



9 Toxic or Negative Behavior

ALIGN BEHAVIOR EXPECTATIONS WITH CORE VALUES AND PRINCIPLES. ESTABLISH CLEAR GUIDELINES THAT ARE CLEARLY COMMUNICATED, AND THEN ENFORCED WITH NO TOLERANCE. ELIMINATE GOSSIP.



10 Inadequate Employee Recognition

DEVELOP RECOGNITION COMMITTEE AND PROGRAMS THAT SUPPORT HOW DIFFERENT TYPES OF PEOPLE LIKE TO BE RECOGNIZED. INTEGRATE CORE VALUES INTO EMPLOYEE RECOGNITION.

3.8: WATCH- How Can HR Create a Culture of Recognition

Organizations have a lot of different employee recognition tools at their disposal today. One challenge is bringing these tools together in a cohesive program that increases engagement and builds a stronger company culture.



Source: "[How to Tackle 5 HR Challenges - Topic 5: How Can HR Create a Culture of Recognition?](#)", Paylocity.

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3.9: WATCH- 3 Ways to Create a Work Culture That Brings Out the Best in Employees

Chris White leads the University of Michigan's Center for Positive Organizations. Through ground-breaking research, educational programs and organizational partnerships, the center helps leaders build high-performing organizations that bring out the best in people.



Source: "[3 ways to create a work culture that brings out the best in employees](#)" | Chris White | TEDxAtlanta

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3.10: WATCH- In-N-Out Burger, Chipotle, Starbucks

Sharon Zackfia, William Blair Equity Research Group Head of Consumer Sector, joins Yahoo Finance Live anchors to discuss the results of William Blair's restaurant survey and how restaurant chains can improve employee retention.



Source: "[In-N-Out Burger, Chipotle, Starbucks: How restaurants rank for employee satisfaction](#)", Yahoo Finance.

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3.11: WATCH- Satisfaction and Retention

Why is belonging important?

We've been hearing about the "Great Resignation" since April, but wouldn't it be great if employers knew about potential retention problems before their employees quit? In this episode, Sarah explains how regular employee surveys can help you keep your finger on the pulse of employee satisfaction.



Source: "[Satisfaction and Retention: How Taking Surveys Can Help You Keep Employees](#)", HR Party of One.

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4: Employee Engagement

Employee engagement is about motivation, commitment, and connection to work. Engaged employees feel valued, contribute their best, and help drive success. Creating a positive environment where people feel heard and supported leads to stronger teams and better results.



Image Source: Dwayne Bennett, "[HR Partners and Supervisors: The 3 Greatest Barriers to Supervisory Success](#)", LinkedIn.

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4.1: WATCH- What is Employee Experience

Many organizations use employee engagement and employee experience interchangeably. But that's wrong! Employee engagement is the short-term cosmetic changes organizations make to improve how they work. Unfortunately, these things make the organization look better but have little impact on how it actually performs. Employee experience, on the other hand, is the long-term redesign of the organization. Employees help shape their experiences instead of simply having them designed by the organization. Employee experience is the intersection of employee expectations, needs, and wants, and the organizational design of those expectations, needs, and wants.



Source: "[What is Employee Experience?](#)" | Jacob Morgan

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4.2: READ- Fixing Poor Engagement Starts With Understanding Its Cause

Fixing Poor Engagement Starts with Understanding Its Cause

When Jessica Cancel, SHRM-SCP, joined the Pace Center for Girls in 2011 as director of HR and administration, the Florida nonprofit's Jacksonville headquarters was suffering from a 60 percent turnover rate.

The reasons were quick to identify: Even basic back-office processes ran erratically. Payroll errors were common. Managers, most of whom had been promoted from within, had experience working with the organization's clients but not in managing teams. Their struggles to organize, communicate and lead made the center an often-unhappy place to work, even for people who were dedicated to its mission.

The situation faced by Cancel—who's now the Pace Center's chief operating officer—isn't unique. Although HR practitioners and experts talk almost nonstop about how to build and maintain engagement, the hard truth is your workforce probably isn't feeling the love.

According to Gallup, just 33 percent of American workers are engaged by their jobs. Fifty-two percent say they're "just showing up," and 17 percent describe themselves as "actively disengaged." Such numbers have real consequences for your business, observed Michelle M. Smith, a member of the Total Rewards Expert Council at Scottsdale, Ariz.-based WorlDatWork. Gallup's research has also shown that engaged workers contribute measurably to the organization: They're 18 percent more productive, for example, 37 percent less prone to absenteeism, and generate earnings that are 18 percent higher.

If you discover that engagement is low, you need to develop a plan for building it back up. But before you start, there's a lot of prep work to do. After all, engagement is about how people feel, so understanding the workforce's mindset is critical.

Understand What's Happening and Why

At the Pace Center, CEO Mary Marx had already recognized that the organization's headquarters was struggling in operations and morale. Her solution was to hire a new executive team, many of whom, like Cancel, had for-profit experience, as well as an understanding of the center's mission. When the team first sat down, its initial question was, "Where do we start?"

The first step is to learn why employees feel disengaged. The most effective way to do that, Smith said, is to ask in direct conversations with a wide range of employees. In these conversations, be empathetic and resist the temptation to defend or explain problems that come up, she said. "Your role is to nondefensively and respectfully receive the input that will ultimately form the basis of your solution."

Also, conduct an anonymous survey that gives the entire workforce an opportunity to chime in. Mila Singh, a culture strategist for CultureIQ in New York City, recommends focusing your questions on the organization's leadership, career development opportunities, company pride and how everyone views their working relationships. Focus groups and town hall meetings can help clarify issues the survey may uncover.

Finally, get a handle on more objective issues by tracking workforce-related key performance indicators, Cancel said. When she began working at Pace, "no one knew the turnover rate, the cost of turnover or had conducted any benchmarking against other employers in the area," she said.

Diving deep—by both listening and studying data—is key to addressing engagement issues.

That's because you can't solve problems unless you really understand them, said Prem Kumar, product manager of the feedback-software provider TINYpulse in Seattle. When faced with engagement troubles, many companies jump straight into searching for a single root cause. They might ask, "Was it because of our recent organizational change? Is it because our CEO has been traveling a lot lately?"

"Stop that line of thinking and get out there and listen before you diagnose," Kumar said.

Keep Your Promises

As you gather feedback, make sure HR and the organization's leadership are on the same page about what you're going to do with it. "Don't even bother to ask employees what's preventing them from feeling more engaged ... if you don't intend to publicly do

something with what you learn," Smith warned. "You'll do more harm to your company culture and employees' engagement levels if your inquiries don't result in visible changes in the workplace."

If topics come up that are impossible to act on, Smith suggests clearly and honestly explaining why HR can't take action. This is particularly important because practitioners are often criticized for being reactive rather than proactive.

Sylvia Alcozer, director of HR for PetroChoice, a lubricants distributor based in Fort Washington, Pa., recalled when layoffs at a previous employer led to "a breakdown in communication and trust." HR began keeping more flexible hours so workers from all three shifts could review their concerns on a one-on-one basis and learn about training and other opportunities. "Yes, there were many changes, yet the process did open up and clarify the issues to bring resolutions to all levels of the organization and employees," Alcozer said. Adding a suggestion box, a dedicated e-mail address and brown-bag meetings during lunches and breaks also helped the organization and employees connect.

At the Pace Center, Cancel transitioned her department from being human resources and administration to organizational development (OD). One reason was her belief in the OD process: assess, get feedback, diagnose issues, prescribe solutions, then do it all again. She was quick to address basic operational flaws. By reviewing and revising a number of organizational policies—some of which were 27 years old—she was able to improve areas like payroll so that errors became rare. She looked for "quick wins for middle management" by providing training on topics such as the Family and Medical Leave Act and how to conduct effective one-on-one meetings.

The emphasis on action is a good step to take. Once leaders get feedback data, "they sometimes go into 'analysis paralysis' and can't decide on a focus area, which results in spinning wheels," Singh observed. "The best thing to do is select one or two areas you think will have the biggest impact on engagement" and act on them.

Communicate at All Levels

"Transparency is at the heart of any plan to attack disengagement," Kumar said. It shows the workforce respect, whether you're honestly explaining why a decision was made or demonstrating that executives and HR hold themselves and others accountable. "This is key to a great culture. Culture is really a living, breathing organism, and if you cut off certain parts from others—well, you know what will happen next."

While experts agree that engagement begins at the top, Smith believes "very strongly that middle managers and supervisors are the most-impactful factor in determining engagement levels in an organization." The quality of employees' relationships with their immediate supervisors "overwhelmingly determines the level of engagement and can account for as much as 70 percent of our engagement score."

Gallup's research, however, shows that managers don't spend enough time communicating with their direct reports. For example, 53 percent of employees don't have a clear understanding of how their role contributes to their company's objectives, and 54 percent believe their colleagues appreciate them more than their supervisors or company executives do. That lack of communication weakens the relationship. At the Pace Center, Cancel directed much of her energy to building stronger ties between managers and staff. As communication improved, more workers came to understand the growth opportunities available to them.

Have a Plan and Track Your Progress

When it comes to increasing engagement, exactly what HR does and how it does it will vary from company to company and, if you decide to bring one in, from consultant to consultant. However, engagement professionals have some tips to consider as you develop your plan:

- Culture is driven from the top down, so senior leaders must be involved in any plan's implementation by directing initiatives and making sure to communicate about them, Singh said. The leadership team should also meet regularly to review the plan's progress.
- Set specific goals and assign responsibility for each one. Determine ahead of time how progress will be measured, then track results on an ongoing basis.
- Rewards are an important part of most engagement programs, so develop an approach that aligns with the interests of your workforce and recognizes the effort employees need to put in at each step.
- You need a budget. Ask yourself what's possible with the money you have and what you want to achieve. Plan for how your expenses will change based on positive or negative outcomes.

- This never ends. "Everyone has to accept this is iterative," said Marta Moakley, a legal editor at XpertHR. "What employees value one year may not be true the next year, and you have to keep up with the workforce's concerns."

To Cancel, improving engagement was about fixing processes and building relationships among both staff and managers across the organization. With the back office functioning smoothly, middle managers communicating effectively, and a program in place to teach 4/5 employees how other functions operate, the team is more cohesive, and engagement vastly improved. By 2017, the turnover rate at Pace Center's headquarters had dropped from 60 to 28 percent. Cancel's goal is to cut that by half within five years.

Mark Feffer is a freelance business writer based in Philadelphia.

Source

- Mark Feffer, "Fixing Poor Engagement Starts with Understanding Its Cause", SHRM, March 26, 2018

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4.3: REVIEW- Gallup

Gallup is a global analytics and advisory company specializing in research, polling, and workplace consulting. Founded by George Gallup in 1935 as the [American Institute of Public Opinion](#), it has grown into a preeminent firm known for its global reach and expertise in measuring public opinion and workplace performance.

Review the following areas of Gallup's website to learn more about the following:

Employee Engagement:

What We Measure:

Employee engagement is the involvement and enthusiasm of employees in both their work and workplace. Highly engaged teams outperform the rest in business outcomes critical to the success of your organization.

Follow this link to learn more about [Employee Engagement](#).

Employee Retention & Attraction:

What We Measure:

We measure employee retention and attraction trends, as well as employee perceptions of their current job climate, to help organizations more effectively retain and attract top talent.

Follow this link to learn more about [Employee Retention & Attraction](#).

Leadership & Management:

What We Measure:

To help leaders and managers more effectively lead their teams and organizations to greater success, Gallup measures U.S. employees' perceptions of their interactions with leaders and managers, as well as their experiences related to performance management in their organization.

Follow this link to learn more about [Leadership & Management](#).

Life Evaluation Index:

What We Measure:

The Life Evaluation Index measures how people rate their current and expected future lives.

Follow this link to learn more about [Life Evaluation Index](#).

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4.4: WATCH- Combatting Low Culture Survey Results

What do you do when you get low culture survey results? A study by the Society for Human Resource Management found that 80% of employees say that workplace culture is a crucial factor in their decision to stay in an organization. Here are three tips on how you can improve employee culture survey results.



Source: "[Combatting Low Culture Survey Results](#)", Unique Training and Development.

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4.5: WATCH- Workhuman Customer Story

Anita Mueller, Senior Vice President of Club & Automotive, believes that [#recognition](#) is an incredible way to make people feel valued. Here, she discusses the impact gratitude can have on an employee's career.



Source: "[Workhuman Customer Story: How to Show Employee Recognition – Why Being Genuine & Specific Matters](#)", Workhuman.

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4.6: READ- Recognizing and Retaining Talent

Recognizing and Retaining Your Talent: A Strategy for Success

Dear HR and Workplace Leaders,

Employee turnover is dangerously high right now.

In a time when we need more skilled workers, we are seeing talented employees leave their jobs.

As employers, we often feel like it's out of our hands. Our best employee found a better opportunity ... there's nothing we can do about it, right?

Wrong.

These employees are leaving for specific reasons. It could be burnout, lack of career development opportunities, toxic workplace cultures, or a lack of recognition.

The good news?

These are all fixable problems.

Yes, addressing these issues requires time, money, and effort. But contrary to popular belief, it IS possible to prioritize both profit and the employee experience.

Today, I want to focus on the connection between recognition and retention—and why it's critical that we, as employers, understand and embrace that connection.

The Power of Recognition

Employee recognition is not only the moral thing to do—it's also a smart business move.

It seems obvious we should recognize our employees' achievements. But that's just the easy part. The key to employee recognition is two-fold: being consistent and thoughtful, and creating a structured recognition program.

The first part requires us, the employers, to consistently showcase our appreciation for our employees' time, energy, and loyalty. Some ideas? Say, "Thank you." Be specific about what we appreciate. Seek employee input. Showcase people's accomplishments in the office. Reward results. Celebrate career milestones.

Furthermore, a structured recognition program can help take recognition to the next level. Programs that celebrate achievements, highlight core values, and foster a sense of belonging play a big role in creating a positive workplace culture.

If you are going to take these steps and implement real changes to your workplace culture— and prioritize employee recognition—I'm confident you will see financial benefits.

Linking Recognition to Retention

Recognition and retention go hand in hand for one simple reason: People spend most of their waking hours at work. It's only natural to want to feel appreciated for their efforts and commitment to their organization.

Studies show that when employees do feel appreciated, they become more engaged, motivated, productive, collaborative, and fulfilled.

As a result, they are less likely to wonder whether the grass is greener on the other side— namely, with other companies. Thus, recognition dramatically reduces turnover.

In fact, SHRM research shows that employees who regularly receive meaningful recognition are 55% less likely to consider external job opportunities. This should be a wake-up call for any organization struggling with turnover. The costs associated with recruiting, training, and onboarding new employees far outweigh the investment needed to implement a robust recognition program.

Strategies for Success

To maximize the impact of your employee recognition efforts, consider the following strategies:

Tailor Recognition Programs: Understand what motivates your employees. Some may prefer public acknowledgment, while others might appreciate a private note or reward. Tailor your recognition efforts to fit the individual preferences of your team members.

Integrate Recognition into Daily Operations: Recognition should be a regular part of your workplace culture, not just an annual event. Make it a habit to acknowledge achievements in real time, whether it's through daily stand-ups, team meetings, or internal communications.

Empower Managers: Train your managers to recognize and reward their teams effectively. A manager's acknowledgment often carries significant weight and can be a powerful tool in retaining top talent.

Leverage Technology: Use recognition platforms to streamline and track recognition efforts. These tools can help ensure no good deed goes unnoticed. They can also provide data to measure the effectiveness of your recognition programs.

Conclusion

In today's competitive market, where top talent is hard to find, retaining your best employees should be a top priority. Employee recognition is critical to maintaining a motivated, engaged, and loyal workforce. By prioritizing recognition, you can create a positive workplace culture that not only attracts but also retains the talent your organization needs to thrive.

Remember: Recognition is the bridge that connects your employees' efforts to the success of your organization. When employees feel valued, they stay ... And when they stay, they contribute to the long-term growth of your company.

Let's make recognition a cornerstone of our retention strategies.

Yours in service,

Johnny C. Taylor, Jr., SHRM-SCP

President & CEO, SHRM

Source

- Johnny C. Taylor, Jr., "[Recognizing and Retaining Your Talent: A Strategy for Success.](#)" LinkedIn. November 20, 2024.

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4.7: WATCH- How to Motivate and Engage Your Team

We might cringe at the idea of fun at work, but when it isn't forced, it makes a huge difference in the employee experience. It connects your employees; strengthening communication and teamwork while driving one of the most important factors in increasing productivity and profitability: engagement.



Source: "[How to Motivate and Engage Your Team](#)" | Workhuman

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4.8: WATCH- The Truth About Employee Engagement Surveys

There's a tendency to treat employee engagement like the score of a game, and so we shouldn't be surprised when people try to game the system and improve the score. But the point of collecting all that data isn't to learn how to improve a number, it's to know where we need to pay more attention to our people and how we can help them feel more connected to their work and to the team they work with.



Source: "[The Truth About Employee Engagement Surveys](#)", David Burkus.

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5: Change Management

Managing change is about guiding people through transitions with clarity and support. It requires adaptability, communication, and a shared vision to help individuals and teams embrace new challenges. By leading change effectively, organizations create resilience and growth opportunities.



Image Source: Gavin Treacy. "[Gavin Treacy 🇺🇦's Post](#)". LinkedIn.

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5.1: READ and WATCH- 5 Steps in the Change Management Process

5 Steps in the Change Management Process



Businesses must constantly evolve and adapt to meet a variety of challenges—from changes in technology, to the rise of new competitors, to a shift in laws, regulations, or underlying economic trends. Failure to do so could lead to stagnation or, worse, failure.

Approximately 50 percent of all organizational change initiatives are unsuccessful, highlighting why knowing how to plan for, coordinate, and carry out change is a valuable skill for managers and business leaders alike.

Have you been tasked with managing a significant change initiative for your organization? Would you like to demonstrate that you're capable of spearheading such an initiative the next time one arises? Here's an overview of what change management is, the key steps in the process, and actions you can take to develop your managerial skills and become more effective in your role.

What is Change Management?

Organizational change refers broadly to the actions a business takes to change or adjust a significant component of its organization. This may include company culture, internal processes, underlying technology or infrastructure, corporate hierarchy, or another critical aspect.

Organizational change can be either adaptive or transformational:

- **Adaptive changes** are small, gradual, iterative changes that an organization undertakes to evolve its products, processes, workflows, and strategies over time. Hiring a new team member to address increased demand or implementing a new work-from-home policy to attract more qualified job applicants are both examples of adaptive changes.
- **Transformational changes** are larger in scale and scope and often signify a dramatic and, occasionally sudden, departure from the status quo. Launching a new product or business division, or deciding to expand internationally, are examples of transformational change.

Change management is the process of guiding organizational change to fruition, from the earliest stages of conception and preparation, through implementation and, finally, to resolution.

As a leader, it's essential to understand the change management process to ensure your entire organization can navigate transitions smoothly. Doing so can determine the potential impact of any organizational changes and prepare your teams accordingly. When your team is prepared, you can ensure everyone is on the same page, create a safe environment, and engage the entire team toward a common goal.

Change processes have a set of starting conditions (point A) and a functional endpoint (point B). The process in between is dynamic and unfolds in stages. Here's a summary of the key steps in the change management process.

1. Prepare the Organization for Change

For an organization to successfully pursue and implement change, it must be prepared both logistically and culturally. Before delving into logistics, cultural preparation must first take place to achieve the best business outcome.

In the preparation phase, the manager is focused on helping employees recognize and understand the need for change. They raise awareness of the various challenges or problems facing the organization that are acting as forces of change and generating dissatisfaction with the status quo. Gaining this initial buy-in from employees who will help implement the change can remove friction and resistance later on.

2. Craft a Vision and Plan for Change

Once the organization is ready to embrace change, managers must develop a thorough, realistic, and strategic plan for bringing it about.

The plan should detail:

- Strategic goals: What goals does this change help the organization work toward?
- Key performance indicators: How will success be measured? What metrics need to be moved? What's the baseline for how things currently stand?
- Project stakeholders and team: Who will oversee the task of implementing change? Who needs to sign off at each critical stage? Who will be responsible for implementation?
- Project scope: What discrete steps and actions will the project include? What falls outside of the project scope?

While it's important to have a structured approach, the plan should also account for any unknowns or roadblocks that could arise during the implementation process and would require agility and flexibility to overcome.

3. Implement the Changes

After the plan has been created, all that remains is to follow the steps outlined within it to implement the required change. Whether that involves changes to the company's structure, strategy, systems, processes, employee behaviors, or other aspects will depend on the specifics of the initiative.

During the implementation process, change managers must be focused on empowering their employees to take the necessary steps to achieve the goals of the initiative and celebrate any short-term wins. They should also do their best to anticipate roadblocks and prevent, remove, or mitigate them once identified. Repeated communication of the organization's vision is critical throughout the implementation process to remind team members why change is being pursued.

4. Embed Changes Within Company Culture and Practices

Once the change initiative has been completed, change managers must prevent a reversion to the prior state or status quo. This is particularly important for organizational change related to business processes such as workflows, culture, and strategy formulation. Without an adequate plan, employees may backslide into the "old way" of doing things, particularly during the transitory period.

By embedding changes within the company's culture and practices, it becomes more difficult for backsliding to occur. New organizational structures, controls, and reward systems should all be considered as tools to help change stick.

5. Review Progress and Analyze Results

Just because a change initiative is complete doesn't mean it was successful. Conducting analysis and review, or a "project post mortem," can help business leaders understand whether a change initiative was a success, failure, or mixed result. It can also offer valuable insights and lessons that can be leveraged in future change efforts.

Ask yourself questions like: Were project goals met? If yes, can this success be replicated elsewhere? If not, what went wrong?

The Key to Successful Change for Managers

While no two change initiatives are the same, they typically follow a similar process. To effectively manage change, managers and business leaders must thoroughly understand the steps involved.

Some other tips for managing organizational change include asking yourself questions like:

- Do you understand the forces making change necessary? Without this understanding, it can be difficult to effectively address the underlying causes that have necessitated change, hampering your ability to succeed.
- Do you have a plan? Without a detailed plan and defined strategy, it can be difficult to usher a change initiative through to completion.
- How will you communicate? Successful change management requires effective communication with both your team members and key stakeholders. Designing a communication strategy that acknowledges this reality is critical.
- Have you identified potential roadblocks? While it's impossible to predict everything that might potentially go wrong with a project, taking the time to anticipate potential barriers and devise mitigation strategies before you get started is generally a good idea.

How to Lead Change Management Successfully

If you've been asked to lead a change initiative within your organization, or you'd like to position yourself to oversee such projects in the future, it's critical to begin laying the groundwork for success by developing the skills that can equip you to do the job.

Completing an online management or leadership course can be an effective way of developing those skills and inspire several other benefits. When evaluating your options for training, seek a program that aligns with your personal and professional goals; for example, one that emphasizes organizational change.

This post was updated on August 8, 2023. It was originally published on March 19, 2020.

Source:

Kelsey Miller, "[5 Steps in the Change Management Process](#)", Harvard Business School Online, March 19, 2020.

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5.2: REVIEW- 4 Elements of Effective Plans for Change

4 Elements of Effective Plans for Change



STRATEGIC GOALS

What goals does this change help the organization work toward?



KEY PERFORMANCE INDICATORS

How will success be measured? What metrics need to be moved?
What's the baseline for how things currently stand?



PROJECT STAKEHOLDERS AND TEAM

Who will oversee the task of implementing change? Who needs to sign off at each critical stage? Who will be responsible for implementation?



PROJECT SCOPE

What discrete steps and actions will the project include? What falls outside of the project scope?



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Figure 5.3. 4 Elements of Effective Change: 1. Strategic Goals, 2. Key Performance Indicators. 3. Project Stakeholders and Team, 4. Project Scope.

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5.3: WATCH and READ- Kotter's 8 Step Change Model

John Kotter articulated his 8-step process model for leading change in his 1996 best seller, *Leading Change*. And, although there have been some changes in terminology, all of his team's research since has continued to endorse the basic 8 steps. So, what is Kotter's 8-Step Process for Leading Change.



Implementing change powerfully and successfully

Key Takeaways

- John Kotter developed a proven methodology for embedding change within an organization to ensure long-term success and stability.
- His 8-Step model helps you to discover strategies that craft compelling visions, create a sense of urgency, and build a powerful team that drives change.
- Common challenges the model helps to overcome include not knowing how and where to start, who to involve, and not being able to see the change through to completion.

"Change is the only constant." – Heraclitus, Greek philosopher

What was true more than 2,000 years ago is just as true today. We live in a world where "business as usual" is change. New initiatives, project-based working, technology improvements, staying ahead of the competition – these things come together to drive ongoing changes to the way we work.

Whether you're considering a small change to one or two processes, or a system wide change to an organization, it's common to feel uneasy and intimidated by the scale of the challenge.

You know that the change needs to happen, but you don't really know how to go about delivering it. Where do you start? Whom do you involve? How do you see it through to the end? *Leading Change*

There are many theories about how to "do" change. Many originate with leadership and change management guru, John Kotter. A professor at Harvard Business School and worldrenowned change expert, Kotter introduced his eight-step change process in his 1995 book, *"Leading Change."*

In this article, video and infographic, we look at his eight steps for leading change, below.

Step 1: Create Urgency

For change to happen, it helps if the whole company really wants it. Develop a sense of urgency around the need for change. This may help you spark the initial motivation to get things moving.

This isn't simply a matter of showing people poor sales statistics or talking about increased competition. Open an honest and convincing dialog about what's happening in the marketplace and with your competition. If many people start talking about the change you propose, the urgency can build and feed on itself.

What you can do:

- Identify potential threats, and develop scenarios showing what could happen in the future.
- Examine opportunities that should be, or could be, exploited.
- Start honest discussions, and give dynamic and convincing reasons to get people talking and thinking.
- Request support from customers, outside stakeholders and industry people to strengthen your argument.

Note:

Kotter suggests that for change to be successful, 75 percent of a company's management needs to "buy into" the change. In other words, you have to work really hard on Step 1, and spend significant time and energy building urgency, before moving onto the next steps. Don't panic and jump in too fast because you don't want to risk further short-term losses – if you act without proper preparation, you could be in for a very bumpy ride.

Step 2: Form a Powerful Coalition

Convince people that change is necessary. This often takes strong leadership and visible support from key people within your organization. Managing change isn't enough – you have to lead it.

You can find effective change leaders throughout your organization – they don't necessarily follow the traditional company hierarchy. To lead change, you need to bring together a coalition, or team, of influential people whose power comes from a variety of sources, including job title, status, expertise, and political importance.

Once formed, your "change coalition" needs to work as a team, continuing to build urgency and momentum around the need for change.

What you can do:

- Identify the true leaders in your organization, as well as your key stakeholders.
- Ask for an emotional commitment from these key people.
- Work on team building within your change coalition.
- Check your team for weak areas, and ensure that you have a good mix of people from different departments and different levels within your company.

Step 3: Create a Vision for Change

When you first start thinking about change, there will probably be many great ideas and solutions floating around. Link these concepts to an overall vision that people can grasp easily and remember.

A clear vision can help everyone understand why you're asking them to do something. When people see for themselves what you're trying to achieve, then the directives they're given tend to make more sense.

What you can do:

- Determine the values that are central to the change.
- Develop a short summary (one or two sentences) that captures what you "see" as the future of your organization.
- Create a strategy to execute that vision.
- Ensure that your change coalition can describe the vision in five minutes or less.
- Practice your "vision speech" often.

Step 4: Communicate the Vision

What you do with your vision after you create it will determine your success. Your message will probably have strong competition from other day-to-day communications within the company, so you need to communicate it frequently and powerfully, and embed it within everything that you do.

Don't just call special meetings to communicate your vision. Instead, talk about it every chance you get. Use the vision daily to make decisions and solve problems. When you keep it fresh on everyone's minds, they'll remember it and respond to it.

It's also important to "walk the talk." What you do is far more important – and believable than what you say. Demonstrate the kind of behavior that you want from others.

What you can do:

- Talk often about your change vision.
- Address peoples' concerns and anxieties, openly and honestly.
- Apply your vision to all aspects of operations – from training to performance reviews. Tie everything back to the vision.
- Lead by example.

Step 5: Remove Obstacles

If you follow these steps and reach this point in the change process, you've been talking about your vision and building buy-in from all levels of the organization. Hopefully, your staff wants to get busy and achieve the benefits that you've been promoting.

But is anyone resisting the change? And are there processes or structures that are getting in its way?

Put in place the structure for change, and continually check for barriers to it. Removing obstacles can empower the people you need to execute your vision, and it can help the change move forward.

What you can do:

- Identify, or hire, change leaders whose main roles are to deliver the change.
- Look at your organizational structure, job descriptions, and performance and compensation systems to ensure they're in line with your vision.
- Recognize and reward people for making change happen.
- Identify people who are resisting the change, and help them see what's needed.
- Take action to quickly remove barriers (human or otherwise).

Step 6: Create Short-Term Wins

Nothing motivates more than success. Give your company a taste of victory early in the change process. Within a short time frame (this could be a month or a year, depending on the type of change), you'll want to have some "quick wins" that your staff can see. Without this, critics and negative thinkers might hurt your progress.

Create short-term targets – not just one long-term goal. You want each smaller target to be achievable, with little room for failure. Your change team may have to work very hard to come up with these targets, but each "win" that you produce can further motivate the entire staff.

What you can do:

- Look for sure-fire projects that you can implement without help from any strong critics of the change.
- Don't choose early targets that are expensive. You want to be able to justify the investment in each project.
- Thoroughly analyze the potential pros and cons of your targets. If you don't succeed with an early goal, it can hurt your entire change initiative.
- Reward the people who help you meet the targets.

Step 7: Build on the Change

Kotter argues that many change projects fail because victory is declared too early. Real change runs deep. Quick wins are only the beginning of what needs to be done to achieve long-term change.

Launching one new product using a new system is great. But if you can launch 10 products, that means the new system is working. To reach that 10th success, you need to keep looking for improvements.

Each success provides an opportunity to build on what went right and identify what you can improve.

What you can do:

- After every win, analyze what went right, and what needs improving.
- Set goals to continue building on the momentum you've achieved.
- Learn about kaizen, the idea of continuous improvement.
- Keep ideas fresh by bringing in new change agents and leaders for your change coalition.

Step 8: Anchor the Changes in Corporate Culture

Finally, to make any change stick, it should become part of the core of your organization. Your corporate culture often determines what gets done, so the values behind your vision must show in day-to-day work.

Make continuous efforts to ensure that the change is seen in every aspect of your organization. This will help give that change a solid place in your organization's culture.

It's also important that your company's leaders continue to support the change. This includes existing staff and new leaders who are brought in. If you lose the support of these people, you might end up back where you started.

What you can do:

- Talk about progress every chance you get. Tell success stories about the change process, and repeat other stories that you hear.
- Include the change ideals and values when hiring and training new staff.
- Publicly recognize key members of your original change coalition, and make sure the rest of the staff – new and old – remembers their contributions.
- Create plans to replace key leaders of change as they move on. This will help ensure that their legacy is not lost or forgotten.

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Key Points

You have to work hard to change an organization successfully. When you plan carefully and build the proper foundation, implementing change can be much easier, and you'll improve the chances of success. If you're too impatient, and if you expect too many results too soon, your plans for change are more likely to fail.

Create a sense of urgency, recruit powerful change leaders, build a vision and effectively communicate it, remove obstacles, create quick wins, and build on your momentum. If you do these things, you can help make the change part of your organizational culture. That's when you can declare a true victory. then sit back and enjoy the change that you envisioned so long ago.

Source:

Simon Bell, "[Implementing change powerfully and successfully](#)", Mindtools, December 18, 2024.

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5.4: REVIEW- Kotter's 8 Step Change Process

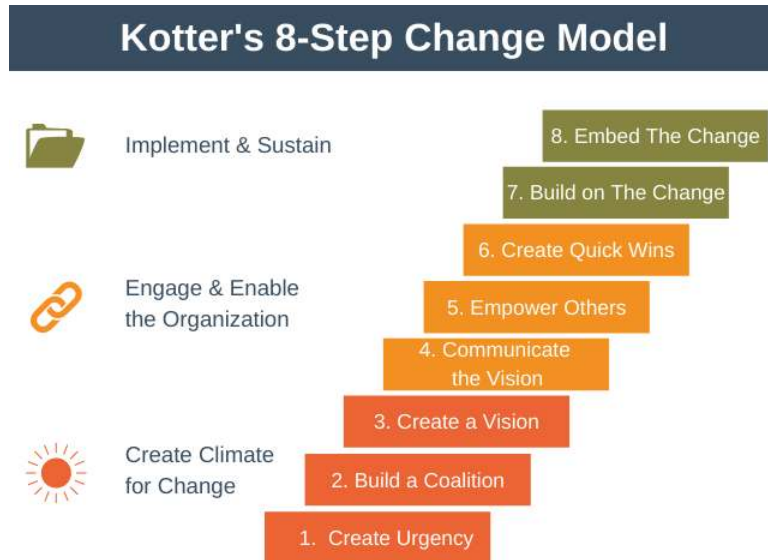


Figure 5.5. Kotter's 8-Step Change Model. 1. Create urgency 2. Build a coalition 3. Create a vision 4. Communicate the vision 5. Empower others 6. Create quick wins 7. Build on the change 8. Embed the change.

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5.5: READ- 7 Reasons Change Management Fails

7 Reasons Why Change Management Strategies Fail and How to Avoid Them

To stay competitive in today's rapidly-changing business environment, organizations must be willing — and able — to constantly adapt and evolve their business strategy.

It sounds easy enough. After all, the COVID-19 pandemic is a perfect example of how quickly the world can change and how quickly businesses need to — and can — respond.

The reality of change management is much less clear-cut.

Organizations, like people, are often highly resistant to change, even when we know it's necessary. As a result, successfully adopting a new strategy with a change initiative, regardless of how incremental or radical, is usually difficult and often messy. And the consequences of a poorly-managed organizational transformation can be devastating.

Today more than ever, organizations need leaders with the knowledge and skills to plan and manage change successfully. According to David A. Shore, instructor of two Harvard DCE Professional & Executive Development programs focused on strategies for leading change, leadership is often the key to a successful change initiative.

"When change initiatives fail (and they do so more often than not) they rarely fail on technical skills (hard skills), they fail on the people skills. I have identified what I have come to call 'The Great Enablers.' While they are not the goal of any change initiative, they are the engine and as such they represent a cornerstone of the programs I teach," Shore notes.

Understanding some of the most common reasons why strategies for change fail — and ways to avoid those pitfalls — can help you prevent an organizational disaster and lead a successful change initiative.

What is Change Management and Why Do We Need It?

A change management strategy is a planned methodology that enables leaders to successfully guide an organization through change, while minimizing disruption and the risk of unexpected consequences. And while the goal may be to change the organization, the key to success — in most cases — lies in the ability to lead people through the change.

Businesses seek to change — in most cases — because their current business strategy is no longer promoting the success of the organization. A new strategy is required to increase profit margins, for example, or remain competitive in a changing business landscape.

"Change initiatives are the vehicles by which strategy is delivered," according to Shore. "They represent the most significant dimension in determining whether goals and objectives are achieved. They are the connective tissue that allows us to bridge the gap between strategy and execution."

No change initiative looks the same, but will vary widely depending on the strategic goals of the organization. Your change initiative may focus on improving efficiency or performance or building better processes. It may be slow and iterative — introducing new features into an existing product, for instance — or it could be revolutionary, such as creating an entirely new product line.

Yet regardless of the nature or scope of the change, it will likely be disruptive to your employees and to your business processes alike. Even small changes, no matter how well-meaning or necessary, can have unintended consequences. And as change becomes larger and more complex, the risks increase, as does the need for a systematic approach.

Therefore, having a systematic approach to change — and leading your teams through change — is critical.

As Shore notes, "A point of distinction between managing change and project management is that the former has as a cornerstone leading human capital (people) in a way that facilitates the intended outcome. If you can't change your people, you can't change anything."

How Has Change Management Evolved?

The idea that changing business strategy must be managed is relatively new. Until the late 1940s (generally speaking), most leadership models were relatively straightforward: the boss decided to make a change and his subordinates carried it out.

Today, leaders are aware that change is extremely complex and that a heavy-handed, topdown approach is rarely successful. Thinking about how to manage change has moved from an academic exercise to the creation of actionable guidelines for business leaders.

From the 1950s to the early 1990s, the theory of change management — and it was very much a theoretical exercise at first — changed in two important ways. First, it began to identify the importance of the employee in promoting — and resisting — change. Second, it began to recognize that successful change often occurs in stages, and that these stages could be predicted, planned, and managed.

Change management as a formal, multi-phase process took its modern form in the late 1990s. Leading Change, a 1996 book by John Kotter, popularized the idea of change management, bringing it from academic theory into the practical world of business. Kotter's eight-step change management process continues to define much of the language around change management nearly 25 years later.

7 Ways that Change Management Strategies Fail

Yet, even as thought leadership on change management has become more in-depth and sophisticated, one simple fact remains: change management is still very difficult.

Successfully implementing change — whether large or small — remains one of the greatest challenges facing leaders.

Identifying some of the most common reasons why change management strategies fail can help leaders think more critically about how their actions may be helping — or hindering — their organizations from reaching their goals.

#1: Starting with an Incomplete or Poorly-Defined Strategy

When thinking about an organizational transformation, leaders often focus on what the change is and why it is necessary. However, failing to give equal priority to how the change will happen can undermine any transformation effort.

Without a comprehensive change management strategy, short term tactical decisions can delay or undermine long-term results. They can lead your organization down an unexpected — or unwanted—path and make it more difficult, or even impossible, to achieve the desired results.

In addition, the lack of a strategic change management plan can make it more difficult to build a strong guiding coalition and buy-in, hinder your communication with employees, and create misunderstandings and diminish trust in the leadership team.

The Solution: Invest significant time and energy into creating a comprehensive change management strategy before starting any change initiative. It can be helpful to choose a model to follow: Kotter's 8-Step Process, ® ADKAR Lewin's Change Management Model, or Prosci's Model — to name a few — can all offer a starting point on which to build your unique strategy.

As you build out your strategy, identify areas of resistance and potential problems you think you may encounter. SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis can be a helpful tactical tool to help develop alternate pathways to achieve your long-term goals. While you likely can't plan for every single contingency, developing a robust strategy will help you minimize unexpected problems.

#2: Following a Strategy that is Too Rigid and Inflexible

Having a well-defined change management strategy can be key to keeping your change initiative on track. At the same time, however, being too dogmatic and inflexible in implementing that plan can be equally detrimental to your long-term success.

No matter how much thought and planning you put into your strategy, you are unlikely to account for every development. Change — especially large-scale change — can take a long time, and the environment and market are also changing around you. Failure to adapt your strategy to unanticipated or sudden developments can render your long-term strategy ineffective, or at worst, irrelevant.

The Solution: Revisit your strategy plan frequently, both before and after unexpected developments occur.

Be sure that your long-term vision and goals are clear, but also that your strategy includes short- and mid-term objectives that you can revisit and realign to account for changes in the environment around you. Don't be afraid to make adjustments throughout the process to keep your end goals on track.

#3: Lack of Effective Communications

Leaders often spend a great deal of time communicating about the proposed change in order to gain buy-in before beginning the change initiative. However, change management strategies often fail or fizzle out when leaders don't communicate enough after the initiative is announced.

For example, you announce your vision and strategy for change in an all-staff meeting. You then reinforce the message in an email to the organization or the team. You schedule follow up meetings with key stakeholders and 1:1s with your employees. At this point, it's easy to believe that the message has been received and the organization is on board.

In reality, once the initial communication drive is over, the day-to-day demands of the job take over and enthusiasm for change diminishes. Your team quickly reverts to the comfort of the status quo.

The Solution: Create a short, comprehensible explanation of your change strategy. It should be clear, consistent, and constant. Be prepared to repeat that explanation frequently, throughout the entire process and with everyone who may be impacted, no matter how remotely.

Make sure that every action that the leadership team takes aligns with your vision of change. Every interaction with your team, from a staff meeting to a performance evaluation, is an opportunity to educate the organization about why this change is important and the positive impact you believe it will have on the organization in the long run.

When it comes to change management, remember that even if you think you have communicated enough, you probably haven't.

#4: Failing to Identify and Address Resistance

Every change initiative is going to encounter resistance. This is true no matter how much you worked to build a guiding coalition before launch and no matter how well you communicate and create enthusiasm after launch.

In fact, according to Shore, resistance to change is the most common reason why many change initiatives fail.

"People are people—carbon and water. As such, we resist change. It's important to recognize that managing change is about upsetting people only at a rate that they can tolerate. It's all about physics. For change there must be movement. With movement there is friction," Shore says.

People resist change for many reasons. They may be uncomfortable with the unknown or perceived risk. They may misunderstand or disagree with the goals and/or the strategy of the change initiative. They may fear what change means for their role or even their job security. They may lack trust in the management team or the organization.

Unless their specific concerns are addressed, resistance can easily derail or undermine the change initiative, either covertly or overtly. As Shore notes, "The job of an agent of change is to address this friction."

The Solution: Make a strategic and thoughtful assessment of how your change initiative may impact your employees in order to identify potential resistance from the start. Tailor your communication strategy so that you can address that resistance as soon as—or even before—it arises.

And most importantly, actively listen to and engage your employees throughout your change management strategy. Active listening is the best way to avoid misunderstandings, ensure that all parties have complete and accurate information, and address fear, anxiety, and discomfort that comes with any change.

#5: Disconnect Between Strategy and Culture

Have you heard your employees say, "That's not the way we do things around here?" If you have, then your change management strategy is probably in conflict with your organizational culture.

Change initiatives that work against existing corporate culture will likely be more difficult and less likely to succeed. Demands to change workplace habits and behaviors will be met with distrust and resistance if employees lack trust that the organization will support and reward those changes in the long term.

Conversely, if the proposed changes are already in line with a shared vision of the organization's purpose and goals, employees are more likely to trust that their efforts in supporting change will be rewarded.

The Solution: Ensure that your change management strategy is grounded in a realistic assessment of your organization's culture and vision.

Even before you begin a change, make certain that senior management and front line employees alike are aligned on organizational priorities and goals, as well as on reward structures and tolerance for risk. An effective communications plan should include a focus on how your change supports the shared vision for your organization.

#6: Setting Unrealistic Expectations

One of the major pitfalls when starting a change initiative is to push too hard, for too much, and too quickly. Rushing through a change increases the risk of mistakes and removes the opportunity to respond appropriately to changing events. And moving too fast can quickly burn out both your team and your organization. Change fatigue can quickly undermine even the most enthusiastic team.

The pressure to do too much too quickly comes in several different forms:

- The marketplace: Rapid change may be required to stay competitive. Waiting too long to launch a new product, for example, could leave an opening for your competitors.
- Top management: Executives often underestimate how long change takes and how much it will cost, and they overestimate the end results. Enthusiasm for change can quickly fizzle when it takes too long or gains aren't perceived as "big enough."
- The need for momentum: People and organizations alike have short attention spans. It can be challenging to sustain enthusiasm for change over the long term.

The Solution: Managing expectations — both positive and negative — during a change initiative is just as important as managing the change itself. Remind yourself and your key stakeholders — frequently — that true change takes time. A well-paced solution is much more likely to be effective and successful.

Be sure that your strategic plan is realistic in its goals and intended outcomes. Outline a clear timeline, with both short- and long-term objectives. Short- and mid-range goals will help your team stay on target without moving too quickly.

#7: Not Creating—and Celebrating—Short Term Wins

Pushing for change too quickly can lead to burnout. Yet not showing positive progress in a timely manner can be equally detrimental. Employees and teams can easily lose momentum and enthusiasm for a change if they feel they aren't making progress.

And the more difficult the change is — the more it requires changing behaviors or making sacrifices — the more quickly your teams will lose interest.

The Solution: Don't wait for wins to emerge naturally from the change management process. Build them into your strategic plan from the start. As you define your short- and midrange goals, include achievable outcomes that will yield visible results.

And when your team achieves those outcomes, be sure to publicize them as wins, and celebrate them — as soon as they happen. Building on the enthusiasm for a short term win will help sustain momentum for a longer duration.

How Can I Learn to Avoid These Change Management Mistakes?

Leading a change management strategy is challenging and takes effort and dedication. And even the most successful change leader is likely to make a few mistakes and missteps along the way.

However, the skills you need to improve your ability to manage change successfully can be learned at any point in your career.

Professional development programs focused on business strategy generally — and change management strategy specifically — can give you the frameworks and tools to lead your organization's change initiative to completion. These key leadership skills can help you advance your career and help your organization stay competitive in today's crowded and chaotic marketplace.

Source

- Mary Sharp Emerson, "7 Reasons Why Change Management Strategies Fail and How to Avoid Them." Harvard Professional. November 18, 2022.

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5.6: WATCH- Influence Change at Any Level

Leading change can be scary - especially if you're new to the organization, or new to your role. Watch this video to understand how important your role can really be when leading change!

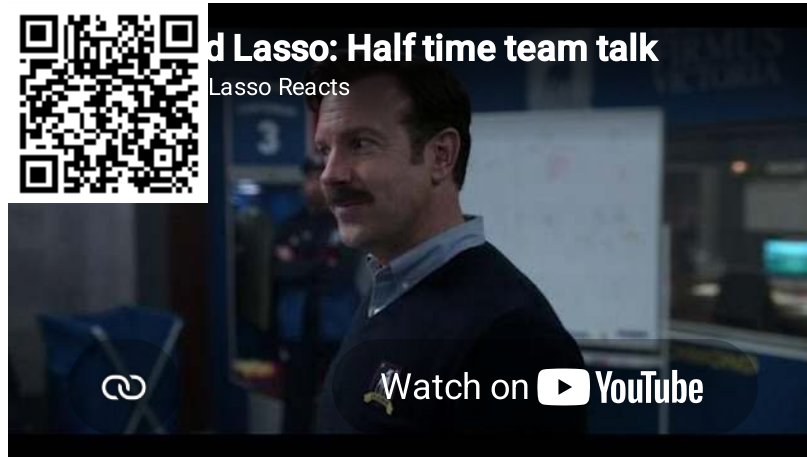


Source: "[Influence Change at Any Level](#)", Simon Sinek.

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5.7: WATCH- Ted Lasso Half Time Team Talk

As you get ready to complete your final assignment in this class, take a moment to watch this video from Ted Lasso about change. Now, go get the work done, and remember, "**BELIEVE!**"



Source: "[Ted Lasso: Half time team talk](#)", Ted Lasso Reacts.

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