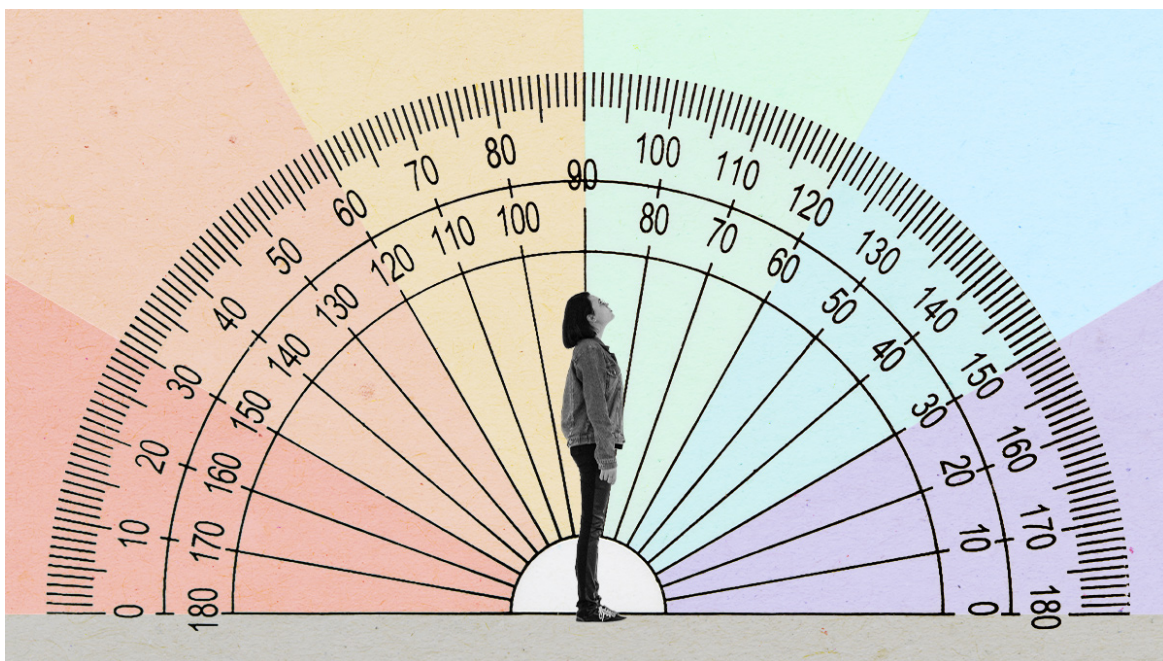


Organizational Culture

How to Measure Inclusion in the Workplace

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Summary. In an era where companies are paying more and more attention to diversity, equity, and inclusion (DEI), inclusion remains the most difficult metric to track. From new research, Gartner developed the Gartner Inclusion Index to measure what true inclusion looks like... [more](#)

There's no doubt that in 2021 and beyond, companies will continue to devote more attention and resources to advancing diversity, equity, and inclusion (DEI). Unfortunately, many organizations still struggle

to measure the impact of their strategies and communicate that impact to a growing number of stakeholders.

More than 1,600 CEOs have signed onto the CEO Action for Diversity & Inclusion Pledge, and 40% of companies discussed diversity and inclusion in their Q2 2020 earnings calls versus only 4% the same quarter a year prior. According to Gartner research, the number of HR leaders identifying DEI efforts as a top priority was 1.8 times higher in 2020 than in 2019. Gartner analysis reveals an almost 800% increase in job postings for dedicated diversity recruiters.

While a recent Gartner survey reveals DEI leaders indicated that “setting goals and tracking DEI progress through metrics” was one of their two top priorities for 2021, measuring workforce representation is a challenge unto itself, particularly for global organizations that need to manage self-identification and define their underrepresented talent segments across geographies. Even once you have that demographic information, it’s hard to know what mark you’re trying to hit: What does “good” look like, in terms of representation?

But inclusion, and a work environment where all people feel respected, accepted, supported and valued, allowing all employees to fully participate in decision-making processes and development opportunities within an organization, is even more of a challenge to measure. Most leaders understand that it is inclusion that unlocks the potential in a diverse workforce. But although organizations have found ways to successfully measure and track diversity, they haven’t been able to do the same for inclusion. This shortcoming has obstructed efforts to develop a unified and coherent metric that tracks overall DEI progress over time. To effectively track inclusion, organizations must measure employee sentiment with a considered definition of inclusion, ensuring the organization can act fast on the results. New Gartner research outlines how to put numbers to the concept, what meaningful action looks like from leaders, and potential pitfalls to avoid in the process.

Capturing Employee Perceptions of Inclusion

In today's uncertain and rapidly changing work environment, employee feedback is an important input to any talent decision. As employees react to disruptions at work, at home, and in the world around them, feelings and opinions can change faster than an annual engagement survey can detect. Many organizations are still navigating a relatively new hybrid work environment as well.

Employee feedback is also the most useful data source for measuring inclusion, especially when leaders can use a "pulse," a quick survey, to check in with employees without adding to distractions. The challenge, however, is in first establishing the right metrics and then asking the right questions.

Gartner set out to address this challenge by building a model of inclusion based on qualitative interviews with more than 30 DEI executives and an extensive review of the academic literature and existing indices. This research identified seven key dimensions of inclusion: fair treatment, integrating differences, decision-making, psychological safety, trust, belonging, and diversity.

We then conducted a survey of nearly 10,000 employees around the world, asking them to rate their level of agreement with 45 statements related to these seven elements, and distilled the responses to determine the one statement for each element that best represents that element of inclusion. This analysis allows organizations to confidently ask just seven questions to get a holistic view of inclusion from their workforce. These are the statements that form the basis of the Gartner Inclusion Index:

1. Fair treatment: Employees at my organization who help the organization achieve its strategic objectives are rewarded and recognized fairly.
2. Integrating differences: Employees at my organization respect and value each other's opinions.
3. Decision making: Members of my team fairly consider ideas and suggestions offered by other team members.

4. Psychological safety: I feel welcome to express my true feelings at work.
5. Trust: Communication we receive from the organization is honest and open.
6. Belonging: People in my organization care about me.
7. Diversity: Managers at my organization are as diverse as the broader workforce.

To put it simply: The greater the degree to which employees agree with these statements, the more inclusive the organization.

The Gartner Inclusion Index utilizes a broad and multi-faceted definition of inclusion and addresses the related concept of diversity by devoting one category to employee perceptions of representation. While diversity and inclusion are distinct concepts — and can be powerful on their own — only when combined can organizations achieve desired outcomes. By including diversity in the index, organizations can take action by understanding how employees perceive diversity alongside the other facets of inclusion.

With these survey results, leaders can create a baseline measure of employee perceptions and look for pockets of inconsistency, both in variability within teams or more broadly between parts of the organization. They can also look at how demographics within their own workforce compare. While it's always good news to have more positive perceptions, measuring consistency is also critical to determine whether the organization is inclusive throughout, or whether there are pockets of toxicity and exclusion hiding in the averages.

Taking Action

In addition to serving as an overall metric to report to stakeholders and set a baseline, pulse surveys help organizations take action on the results to bolster inclusion, starting with employees' day-to-day

experiences, or inclusion “in context.” While there may be takeaways for people processes or the organization as a whole, at the leader and business unit level, meaningful action often looks like the following:

- **Listening:** Armed with this data, leaders can conduct listening sessions or focus groups with subsets of employees to understand the differences in talent processes, leadership, and culture among high-scoring and low-scoring parts of the organization. Then they can confidently craft a plan for change and use the Gartner Inclusion Index again to measure success.
- **Self-reflection:** Leaders should consider their own management style and approach, looking for ways to demonstrate behaviors known to increase inclusion, such as supporting team growth, managing the team’s networks, fostering team accountability, effectively resolving team conflict, and displaying interpersonal integrity.
- **Vigilance:** Business unit leaders have an opportunity to alter the employee experience at scale beyond their teams. For instance, leaders may implement mechanisms to report exclusionary behaviors as they happen. Leaders are also well-positioned to spot microaggressions (within a team or across the organization) or cultural violations, and bear responsibility to do so.
- **Process changes:** Additionally, leaders can influence HR to ensure processes such as recruiting, performance, and succession are regularly audited for equity.

Potential Pitfalls

While employee sentiment is hugely important to advancing inclusion, the exercise of collecting and acting on it has its own challenges. We see organizations struggle with these common pitfalls:

- **Taking too much time to get to an action plan.** If leaders receive results several weeks or months after the survey, then report back action plans months after that, the timeline becomes too long to be helpful. Gartner advises using a shorter, just-in-time pulse approach. HR leaders can create a sample report in advance and

use it to train their partners in different regions and/or business units on how to interpret and present the results.

- **Assuming results will fully guide an action plan.** Utilizing a framework, like the Gartner Inclusion Index, can provide some hugely helpful insights and serve as a benchmark across time. However, there will be other inputs to the process. First, leaders should spend time interviewing areas of the organization that scored relatively well, not just hotspots. These areas may have suggestions for further improvement as well. Also, before the survey, leadership teams may have already spotted challenges, for instance, consistent conflict resolution. Efforts against that challenge should certainly be a part of the inclusion action plan as well.
- **Neglecting to share the actions taken as a result of employee surveys.** Employees want to know their opinions lead to real change in their organizations. To that end, leaders must create a plan to communicate aggregated survey results and intended next actions following a survey. When employees see firsthand the impact the survey has had, they will be more likely to share their honest opinion in the future.

Gartner research shows organizations that confidently measure DEI, create accountability, and embed inclusion into talent decisions and processes report up to 20% more organizational inclusion compared to their peers without those approaches.

So many decisions about how to manage teams and talent processes are in flux right now, changing to accommodate a hybrid workforce or new business approaches emerging in a post-pandemic environment. While tackling these challenges, leaders must ensure measuring and managing inclusion stay on the to-do list as well.

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