



The Open Mind, Open Book,  
Open Heart D&I Framework:

# Using People Data to Connect D&I Programs and Outcomes

**visier**<sup>®</sup>

## Good intentions are not enough. Business leaders need to drive accountability for D&I progress—and data is key to accelerating change.

100 mid-level people managers can have a bigger impact on workforce diversity than 10 C-level executives. But C-level executives (and some HR people) are more likely to regularly encounter diversity data than the people on the frontlines of hiring, promotion, and development decisions.

Let's pose that as a question: Who is more likely to use diversity data in their people decisions: A manager who hears about diversity once a year in a town hall, or an executive who reports to the board on diversity 12 times a year?

Our choices are shaped by the signals we receive, and the managers who make day-to-day people decisions tend to default to the priorities that show up in the last, or next, results they have to explain. Accountability is shaped by the connection between our actions and how it shows up in company results. Organizations drive behaviors and accountability at a granular level with financial results, but are reluctant to do this with D&I data.

This reluctance to set numerical goals for diversity and be transparent with data is rooted in a past defined by avoiding risk. Business leaders say things like, “we have to do diversity training so we don’t get sued” or “we can’t share our diversity data because it will expose us.”

This is not the way to achieve lasting progress. This mindset must change and, in the wake of protests against social injustice, this change is happening—quickly.

Attitudes have changed when it comes to diversity data. Shareholders, customers, and employees judge how committed a company is to making progress by its willingness to share and report on its own representation levels. This, along with a general trend towards openness and transparency, means leaders who hide their numbers are becoming the exception—not the norm.

At the same time, there are mounting levels of frustration within leadership teams. There is little joy for the CEO who walks into the board year after year describing well-intended investments around employee training and targeted hiring, but shows up short in the category of meaningful progress. C-suite leaders can't be involved in every decision, and have fallen short in their ability to influence hiring and promotion decisions that happen three or four levels further down the hierarchy.

We are experiencing a transparency tipping point, one where data can serve as an objective source of truth, and sharing numbers about gaps and progress can be a huge motivator. Even reporting on a lack of improvement drives accountability—evidence of no change is a driver of change.

We share the practices in this document in the hopes that more organizations will go beyond pledges and statements, and drive accountability and change through the effective use of diversity and inclusion data.

As the [Wall Street Journal](#)<sup>1</sup> reports, in September 2020, only 14 US-based companies were making their EEOC data public. By March 2021, 54 companies had either shared—or committed to sharing—these reports. [New SEC human capital reporting guidelines](#)<sup>2</sup> are flexible in terms of requirements, but [a study](#)<sup>3</sup> published in December 2020 found that 54% of the disclosures described D&I.

– Paul Rubenstein, Chief People Officer, Visier



# Digging deeper into your data creates real change

Visier is not immune to D&I challenges. For example, we need more women in management roles<sup>4</sup>. Knowing and showing a gap is not enough. Visier has a culture of transparency around data, but establishing a desired end-state as a company objective brought with it questions about how to drive the right behaviors in pursuit of an outcome—and how best to approach accountability.

**Leaders have no issue being public about the sales performance of different teams. It's time to do the same with people managers and their talent decisions.**

This can be done in a positive manner that isn't just performative. Instead, it's a practice where valuing talent AND diversity becomes the norm. The dark side of inauthentic (and unsustainable) diversity outcomes can be avoided.

But while sharing representation numbers is important, a general number around representation won't really move the needle.

It's not enough to say "we need more women." Organizations have to say "where, when, and why" workforce representation gaps are created and persist. If individual decision makers can't connect their hiring and promotion practices to outcomes, then they will continue to run on auto-pilot. A general company number allows the outcome to be "somebody else's problem."

Diversity as a measure of workforce representation is not the only thing that organizations can measure. Our digital footprint has expanded to the point where even inclusion can now be measured—we can understand who really gets invited to participate in meetings and what our networks look like. Experience measurement can tell us when the moments of inclusion happen, and how attitudes and behaviors are shaped by leaders' communications, town halls, development moments, and other employee lifecycle moments.

And it's the combination of the data from your HR systems, sales systems, performance systems, and applicant tracking systems—along with market data—that really gives you the best picture. Running reports on HR transactions will provide numbers, but not insight into why the representation of women is low or why the turnover of minority employees is high.

For an organization to become truly transformational and tear down D&I barriers, then, it must fire on all cylinders, growing in maturity on three fronts: talent processes, data, and culture.



# The Open Mind, Open Book, Open Heart Framework

Efforts to address diversity and inclusion issues are dominated by three approaches:

- Changing mindsets
- Changing practices
- Changing culture

These usually rely on individuals ‘doing the right thing.’ Those not ready to change can opt out or rely on others to foster inclusion or make talent decisions that move the needle on outcome. Sadly, at the end of the year, most organizations reflect on their workforce composition changes and ask: Why didn’t we hit our goals? Who should we hold accountable?

At Visier, we believe that [data can be used to drive changes in the behaviors guiding the moments that determine workforce representation](#)<sup>5</sup> and shape the dialog of a community that supports inclusion. We set out to combine the practices that shape individual talent decisions with the culture that fosters inclusion through the use of data.

The framework is called “Open Mind, Open Book, Open Heart.” It collects existing practices around D&I into a framework, and fills in the missing pieces around using data to pinpoint and close workforce representation gaps.

The approach doesn’t just use data to drive accountability; it also helps answer critical questions: Do we all have an objective view of the challenge? Are program investments changing outcomes? Are spoken “good intentions” turning into actions? How can data shape everyone’s dialog around diversity, equity, and inclusion?

Let’s explore how the framework looks like in practice.





# OPEN MIND

## Making the unconscious conscious

There are many barriers to achieving a diverse and inclusive workplace. Some impediments are historical and possibly unintentional; many can be traced back to 1970s employment approaches that still inform some HR practices. Other challenges are part of the human condition—we all come to work with a different set of experiences and an uneven level of empathy or agility in navigating cultures that are unfamiliar to us.

Open Mind includes many well-known D&I practices. These are practices focused on addressing process-based bias, as well as elevating everyone's awareness and personal responsibility for fairness and justice in the workplace. Open Mind is organized in two groups.

## Open Mind processes

Below are familiar practices to reduce bias and create fair, transparent approaches to hiring and promotion. The goal is to turn auto-pilot reflexes and historical programs into conscious decisions that eliminate barriers.

We have long observed talent practices rooted more in tradition than proven science. Consider employee referrals, for example. This continues to be a revered tactic for acquiring talent, but if not executed with care, it can hurt diversity efforts.

### Full Accessibility Sourcing

- Inclusive recruiting website content
- Gender-neutral job descriptions
- Diversity in candidate sources and outreach
- Diversity in boolean searches
- Pipeline, slate diversity, and fallout data tracking

### Conscious Advancement

- Clear expectations for job levels
- Internal posting for all positions
- Active networking, exploratory interviews
- Formal career development plans
- Formal mentor programs

### Conscious Hiring

- Structure and standards for interviews
- Interview training (don't assume everyone is good at this)
- Published expectations for candidates
- Documented feedback from interviewers
- Equal footing for referrals & external recruits
- Diverse interview panels





## Open Mind personal development programs

These programs elevate personal awareness, create empathy for the challenges that others face, and connect people to the value of a diverse workforce. Invest in setting expectations for how to operate in your culture, and give employees the tools to understand and manage the automatic scripts that fuel their judgments about other people. Help people understand (and manage) their own biases and let them know what they are accountable for in the workplace.

### Unconscious Bias Testing and Training

- Training to help people get in touch with their own bias and understand their personal responsibility for ensuring fairness and inclusion

### Anti-Racism Training

- This is an emerging practice that emphasizes an active approach to addressing behaviors in the workplace that work against inclusion, belonging, and (ultimately) the progress of the business

### Diversity & Inclusion Training

- Programs that help people unlock an intrinsic connection to a more diverse and inclusive workplace. They should also help people understand how diversity impacts growth, innovation, and overall success as a company





# OPEN BOOK

## A rhythm of insights and accountability

Open Book accelerates changes in workforce representation and inclusivity in culture through the transparent use of data. This gives everyone the same objective view of gaps and progress around D&I. Only then can people use your organization's goals for change as a lens on their everyday decisions around things like hiring, promotion, and behavior.

Open Book emphasizes analytics that predict outcomes based on the next set of hiring and promotion decisions. One size does not fit all when it comes to packaging insights around diversity. Community dialog should be shaped by content that brings together a common view. Individual employee content has to be local and specific enough that it can connect an imminent decision with an overall company mission. Open Book encompasses the following practices.



## Open Book analytics standards

These standards ensure organizations can get ahead of issues and monitor the impact their efforts have on creating a diverse and inclusive workforce. EEOC in the US reporting is a nice start, but there is a greater richness to what can be measured around both diversity and inclusion.

### Holistic Diversity & Inclusion Measurement

- A “complete” picture of the different types of diversity and a privacy policy for proper use. Go beyond race and gender
- Measure inclusion. Use Organization Network Analysis to hold a mirror up to people’s network. Find out who is stranded and not connected to others. Figure out who has meeting curation power and observe moments of inclusivity. It’s not a complete solution for measuring inclusion, but it’s a start
- Use employee surveys for a balanced view of issues and progress (a way to balance loudest/quietest voices). Understand behaviors and attitudes to help design interventions. Apply demographics so that interventions can be targeted

### Root Cause Analysis of Workforce Diversity Gaps

The real challenges often lurk below the surface. [As LinkedIn reports<sup>6</sup>](#), for example, 44.7% of its overall workforce is female, but female representation in tech roles is only 24%. This is why having the capability to slice and dice the data by career level, geography, or job function is crucial. Changing female representation is much easier when you know exactly where and when gaps are created and sustained.

Generally, there are three major practices we recommend:

- Root cause analysis that pinpoints bottlenecks in hiring and promotion
- Action plans for areas where gaps are not rational
- Action plans and accountability for improvement

**Setting accountability requires the use of targets (for workforce outcomes where accountability is diffuse) and goals (where specific actions can be taken and accountability clearly assigned).**



## Open Book accountability standards

These practices for using people analytics to shape an organization's dialog, inspire change, and drive accountability while grounding everyone in an objective reality.

### Alongside Routine Financial Data

Just like the monthly P&L, it is important to create moments where everyone in the organization looks at the same data around progress towards a goal, reflects on progress, and course-correct.

Just like the financial results, no organization or responsible party should be allowed to go more than one month without looking back and saying: Did we change? Why not? What should we do differently? At a minimum we recommend:

- Monthly for the CEO's direct reports
- Monthly at divisional leadership teams

### In The Flow Of Work

We live in an age where data is presented to us in a rhythm designed to change behavior. Consider how people make different choices about spending if their bank account balance is shown to them when they are making a purchase. Bring diversity data into moments that matter to interrupt the status quo. This is the way to connect individual moments to collective outcomes:

- Before promotion cycles
- Before and after bonus cycles
- Pay equity review at comp cycle
- At start and close of hiring process
- Alongside succession planning
- Alongside development program nomination

### Internal Transparency

Sharing data internally sets the tone for everyone's conversation around D&I. It builds an amazing foundation of trust across constituencies and elevates the community dialog

- Annual update on pay equity to explain your process and commitment
- Twice-yearly updates on your diversity progress and programs with Q&A and discussion

### External Transparency

Sharing your challenges and progress externally can radically transform your recruiting efforts—and helps customers, community and partners understand your culture. It becomes another level of accountability for everyone, just like sharing earnings expectations. Turn the [new SEC human capital reporting guidelines](#)<sup>7</sup> into a strategic advantage.

- Create an annual report on diversity and make it available on your website
- Find organizations that align with your values and make public commitments
- Be public with our benchmarks and our POV on how to react to them (we at plan to do this here at Visier)

Rich insights and data transparency create the fertile ground for achieving aspirational D&I goals. In a busy world, exposure to the truth requires us to stop, reflect—and do something different.

# OPEN HEART

## Building a culture of trust

As much as we love data, D&I efforts won't generate change if the focus is entirely on numbers.

Open Heart is a set of practices that harness an organization's social dialog and connect it to a company's vision, values, and purpose. This is in pursuit of a culture of trust, where the opportunity to contribute and the recognition of performance is a productive narrative that is shaped by leaders who approach a charged subject fearlessly—and turn angst into constructive dialog.

Everyone has a part in creating a better workplace. A bottom-up/top-down approach brings together the individual responsibility of employees at every level into a supportive community. Leaders must lead, but they can't do it alone. A community dialog, diversity advisory board or council is critical, whether or not you have a Chief Diversity Officer. When diversity is not run solely by HR, it is more likely to be accepted as a business priority.

We divide these programs into two main categories: leadership and community.

## Open Heart leadership

This establishes structures to provide bi-directional guidance to the leadership team as well as empower individuals to champion a diverse and inclusive culture. Senior leaders who don't just say the right things, but do the right things, set the tone for the entire organization. A change in representation takes time, but the perception of a fair and just workplace changes quickly, both good and bad, based on what leaders do and communicate. Here are some actions to consider:

### Authentic Point of View

- Statement of principles about what D&I means to a company's leaders
- Alignment of company values to reinforce an inclusive, diverse workplace
- Code of expectations for people managers, employees, customers, applicants, and partners

### Ambassador-Advisors

Not every company has a dedicated Diversity Officer. HR should not go it alone on this topic. At Visier, we use a standing group of volunteers who meet monthly with the CHRO. This group provides:

- A quarterly formal update for the CEO
- Active work as change leaders/champions of inclusive behaviors
- Advice on changes to workplace practices
- Communications help—connect people to programs

## Open Heart community

Community, and the dialog about diversity and inclusion, create the foundation for connection, and ultimately belonging. It is the key to making D&I efforts tangible, visible, and accessible. These practices create the fertile landscape where new practices and accountability can thrive. Here are some practices to nurture community:

### Rituals and Celebrations

- A forum to acknowledge the challenge through compassion, outreach, and support. At Visier, we use a combination of town halls, listening sessions and Q&A forums.

### External Outreach

- Promote your practices and aspirations externally. No one company has the magic answer to overcome historical bias and structural inequities in society. Only through the wisdom of many will we make the world better.

### Support For Those Who Need More

- “Share Our Stories” program (celebrating individuals and featuring the richness of what we each bring to work)
- Accessible internal resources on diversity and inclusion for those who are just learning, or want to know more
- Employee Resource Groups to bring together friends and allies
- Compassionate avenues for escalating and resolving issues
- An “ally” culture program and resources for building leaders as allies



## Rise up to the challenge today

We have been talking about D&I for decades, but organizations often struggle with the same age-old issues. It doesn't have to be this way. Change is never easy.

Ground your culture in data to build trust and accountability. Share challenges and progress. Connect individual talent decisions to a larger D&I strategy. Bring good intentions together with accountability for actions through transparency. This is the path to lasting, meaningful change.



# Endnotes

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