⬇️ **DEI Case Study #1** ⬇️

1. **Type of Project:** DEI Strategy and Development
2. **Industry:** Investment Banking
3. **Stakeholders**: 250+ employees
4. **Project Life Span**: 90 days

⬇️ **Company X DEI Goals**⬇️

1. **Strategy:** Create internal strategy that is measurable and achievable.
2. **Scale:** Offer continuity in DEI programs and communication.
3. **Business Case**: DEI is seen as a business imperative resulting in adoption and championing of DEI across all levels of the business including middle management.

⬇️ **Objectives for Achieving Goals**⬇️

Phase I: Analysis

1. Run Metrics: Diagnose areas of opportunity related to diversity dimensions such as generation, ethnicity, nationality and gender. Develop strategies to enhance equity.
   * 1. Analyze numbers related to succession plans, promotions, hiring, pay, sponsorship and mentorship, etc.
     2. Diagnose Risk: Leverage DEI data to uncover WHAT (issues that stand in the way), use insight and intelligence to explain WHY (root cause), and commit to HOW (SMART plans to tackle the issues).
     3. Calculate ROI of DEI: creates a stronger business case for rolling out DEI initiatives.
     4. Provide prescriptive, descriptive and predictive analytics.
2. Collect Survey Data
   1. Develop and distribute survey(s) related to inclusion or leverage Engagement Survey.
   2. Run survey to gauge need and interest in DEI efforts and training.

Phase II: Conduct Needs Assessment

1. Meet with stakeholders
2. Needs assessment is conducted to confirm alignment on:
   1. What DEI means at Company X
   2. Temperature around specific DEI related conversations including concerns
   3. The value of DEI to the business
   4. DEI priorities
   5. Assess status of current DEI-related programs
   6. Recommended methods of assuming buy-in with business objectives
3. Phase IIV: Development
   1. Provide proposal with a detailed DEI strategy.
   2. Offer comprehensive outline on how to implement and scale strategy.
   3. Provide recommendations for DEI training specific to:
   * New Hires
   * Managers
   * HR Team
   * Individual Contributors