

The State of Diversity in PreSales Summit

ERG Best Practices: For the Bystander, Participator, and Leader

Wendy McHenry

Senior Director, Technical PreSales and Customer Success at CData Software

Employee Resource Groups (ERG's) are groups of employees who join together in their workplace based on shared characteristics or life experiences. ERG's drive activities that are aligned with your corporate goals to enhance a culture that is equitable to all diversities. Studies show that employees want meaning and purpose in their work, along with a sense of belonging and connection. ERG's can provide those benefits to employees, while driving more innovative ideas, creating more productive teams, and delivering higher revenue for the company. Read on for ways you can get started with ERG's in your organization!

Impact of ERG's:

Fosters Community

Promotes Education
about Diverse Groups

Provides
Developmental
Opportunities

Supports
Business Goals

Getting Started

Identify the leadership

Find people who are passionate and want to help

Volunteers drive the success of your ERG's

Determine the goals and mission of your ERG's

Our focus was on Recruiting and Retention, Career Development, and Social Impact

Ideally your goals and mission are employee-influenced

Be realistic with what can be accomplished

Our initial goal was to improve Gender Diversity

Our first ERG began with quarterly events- 3 years later we sometimes had multiple events in a single week!

Business Goals

Our business set an initial goal- For example "50% of new hires will be women". We track to our goal and report internally on this goal. The goal should be reasonable based on where you are now- so for example,

if you are 30% women now, getting to 50% women in a year is probably not attainable.

(cont. next page) →

Understand the interests and needs of your teams

Through an employee survey, we understood some of the interests and needs of our team in the pandemic were support for working caregivers, overcoming imposter syndrome, and allyship.

These then formed the basis for our initial programming offerings.

A good best practice is to perform an employee survey annually to assess employees' perceptions and impact of the ERG and its activities and to seek recommendations for additional actions and accommodations.

Executive Sponsorship

Executive Sponsors can help drive the importance of your ERG at the Executive level

My Executive Sponsors have been Champions of the cause and have been a close partner to me when I was in ERG leadership

Budget? What Budget?

Some common experiences with ERG Budgets:

There is no budget- looking within your membership and across your organization for special talents, presenters, and event organizers

Executive Sponsorship budget

ERG Budget- submitting a proposal for funding

ERG Learnings from the PreSales Collective's 2023 State of Diversity Report

The Power of Storytelling

Our interview participants suggested that sharing stories in a town hall or smaller team meeting setting is far more effective than DEI training.

When majority groups have the opportunity to hear the stories of others' learned experiences, they have the opportunity to develop empathy and compassion

ERG members who are willing to share their stories are invaluable- thank you to those brave and courageous souls!

Attendance at ERG Events

Several individuals interviewed shared that their ERG's needed more attendance and felt that attending ERG events conflicted with their other work priorities.

For Managers, it is important for your team members to attend ERG events. It IS part of their job! It is also important that you as a leader learn from as many ERG's as you can. Rotate through each ERG to ensure your exposure to them all.

ERG Goals

We also heard that ERGs need a **clear goal or purpose**. This may also contribute to low attendance as individuals don't know what to expect out of the investment of their time.

If you are an ERG leader, clearly defining your ERG's mission and goals is an important step!

ERG Collaboration

We heard a best practice was for ERG leaders to get together regularly to collaborate and coordinate across their groups

Intersectionality of Identities - many individuals will identify with more than one ERG, due to the intersectionality of our identities. This should be a factor in considering the importance of ERG collaborations- for example, our Women's ERG + Pride ERG hosting a co-sponsored event in June for Pride Month.

(cont. next page) →

How can I show up as an ally?

- In ERG Spaces and ERG Events, your primary role is to show up and listen
- Listen to learn and to understand
- Develop empathy and compassion
- Call out bias, unfairness, and bad behavior when you see it
- Look critically at how you can create an inclusive workplace and inclusive culture for others

What can I do as a bystander?

- Promote ERG events in your network
- Amplify voices!
- Attend your ERG events
- Volunteer to lend your time and talents to your ERG
- If you are so inclined, volunteer for a leadership position with your ERG
- Learn how you can show up as an ally for others
- Call out bias, unfairness, or bad behavior when you see it

Considerations For Managers

- Write inclusive job descriptions- such as removing gender-coded words and phrases. Check out these great tips from [Monster.com](https://www.monster.com)
- Consider the end-to-end candidate interview experience- are you creating an inclusive and engaging environment?
- Consider diverse candidate experiences and backgrounds- some of my best SE's did not have a Computer Science background, for example
- Work intentionally to create an inclusive culture in your team- hiring diverse talent is just the first step. Creating an inclusive environment takes each and every person on the team, but it starts with the Leadership.
- Talent development- the understanding that underrepresented talent may not have been previously offered talent development and training experiences

(cont. next page) →



Resources for Leading your ERG's:

The following resources may be beneficial to you in your travels.

Use these resources for championing the causes of your ERG's:

[Bloomberg Gender Equality Index](#)

[Women in the Workplace Report – McKinsey](#)

[Reboot Representation](#)

[Bill and Melinda Gates Foundation – Gender Equality](#)

Check out these fresh and thoughtful perspectives on Black identity - [Ted Talks to Celebrate Black History Month](#)

Visit the History channel website to learn more about [Black History Month \(BHM\)](#).

Take a closer look at Black History Month, when and why it was established, and inspiring ways to celebrate it in your organization - [How Should I Celebrate Black History Month?](#)

Use these resources for securing your Executive Sponsor, when justifying budget requests, and when building a business case to get started.

[2023 State of Diversity in PreSales \(PreSales Collective\)](#)

[2021 State of Diversity in Presales \(PreSales Collective\)](#)

[Delivering through Diversity \(McKinsey 2018\)](#)

[Diversity Wins \(McKinsey 2020\)](#)

[How Diverse Leadership Teams Boost Innovation \(Boston Consulting Group\)](#)

[Over 86% of Job Seekers Say Workplace Diversity Is an Important Factor When Looking for a Job \(ZipRecruiter\)](#)



How can I get involved with PreSales Collective WISE?

Connect with us on our [website](#) and on our Slack Channel

[#topic-wise_women_in_solution_excellence](#)