



The Beginner's Guide to
**Courageous
Conversations
at Work**

The Beginner's Guide

How to lead courageous conversations at work

Facilitating meaningful conversations may be tough, but it is crucial to the success of your organization – and it results in happier, more engaged, and more productive employees.

Of course you know this, and that's why you're reading this.

This guide will walk you through the key questions to ask yourself as you begin the process of implementing courageous conversations within your organization.

The hardest part is knowing where to start.

So let's get started.



PART 1: THE WHY

Why Inclusion Matters

There's no doubt that fostering genuine inclusion is the right thing to do. Whether that's in our communities, our schools or our workplaces. But did you know that in business, it's also the smart thing to do? There's a growing body of evidence to show that companies that actively invest in inclusion are outperforming those who don't.

Check out some of these numbers:

- **61% of employees have negative sentiments** about how inclusive their companies are.¹
- Diverse companies are **36% more likely to financially outperform** their competitors.¹
- Diverse companies are **1.7 times more innovative**.²
- Companies that champion diversity have a **25% higher chance** of financially outperforming those that don't.²
- Inclusive companies see **2.3 times higher cash flow** per employee than less inclusive companies.²
- Over **70% of job seekers** take company diversity into consideration when fielding an offer.³
- Inclusive companies are **120 times more likely** to hit their financial goals.⁴
- **85% of CEOs of inclusive companies see increased profits**.⁴
- Out of top 5 skills managers can improve, **cultivating a positive and inclusive team culture is #4**.⁵

¹<https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters>

²<https://joshbersin.com/2015/12/why-diversity-and-inclusion-will-be-a-top-priority-for-2016/>

³https://www.google.com/url?q=https://www.glassdoor.com/employers/resources/hr-and-recruiting-stats/&sa=D&source=editors&ust=1633549453880000&usg=AOvVa_w3QnGtMNijKrObmdNhVoe6J

⁴<https://www.fundera.com/resources/diversity-in-the-workplace-statistics>

⁵<https://www.shrm.org/about-shrm/press-room/press-releases/pages/survey-84-percent-of-us-workers-blame-bad-managers-for-creating-unnecessary-stress-.aspx>

PART 1: THE WHY

The Power of Shared Dialogue

Shared dialogue is one of the most effective tools for fostering inclusion.

According to the World Economic Forum, shared dialogue is a proven method for building belonging, increasing psychological safety and creating a more productive work environment.

Most DEI initiatives have some form of educational element, delivered in a monologue format such as video, speaker, presenter or online program. But what's required for real behavior change is peer-to-peer dialogue.

Benefits of peer-to-peer dialogue:

- When training is combined with peer-to-peer dialogue, the likelihood of behavior change increases by 10x.
- Increased feelings of connectedness, psychological safety, and sense of belonging.
- Learners have the chance to reflect on their understanding, contextualize it to their unique environment, and verbalize their commitment to implement it or alter behavior in the future.
- Greater sense of community and trust by allowing stakeholders to share perspectives openly and to allow diverse perspectives to be heard.
- Increased empathy and motivation to alter or change behavior in order to prevent the pain or suffering of others and create a better environment for everyone.

Intention matters.

Each conversation can have an intention, designed to help shift collective mindsets, change narratives, rally around action or simply allow space to grieve, feel heard, and hear one another.

“Structured conversation has the power to transform cities, communities and cultures, simply by giving everyone a voice and a seat at the table. Allowing individuals to feel part of co-creating a better future gives people the power and agency to create real and lasting change.”

Jenn Graham

Founder & CEO

Inclusivv



How To Get Started

Okay... so you know both the human case and the business case for inclusion, and you know that shared dialogue is one of the most effective ways to create inclusion.

Now let's get to the real stuff. The **how**.

Discussing big topics in the workplace takes preparation and courage. Risks are big if these conversations are not thoughtfully approached. So we've put together a guide to help you as you use structured conversations to build a more inclusive culture at work.



PART 2: THE HOW

#1 Define Success

It is much easier to measure results when you have clearly-defined goals and a pre-established way to track outcomes. Work with your team to identify which issues you want to use conversations to address, and establish measurement specifications to track progress.

Here are questions to help you think about what success looks like:

• Impact — What is the goal of your program?

For example, it might be:

- Increase in employee engagement scores
- Increase in positive sentiment
- Increase in sense of community
- Increase in confidence & morale

The key is to pick one main metric and design a way to track it.

• Preparation — How will you prepare moderators?

- What trainings, if any, will you provide?
- Will moderators have a host guide or script to follow?

• Participation — How will we measure participation?

- Is leadership attending? Is it mandatory or voluntary?
- What percentage of those invited attend?
- And does that percentage grow over time?

• Feedback — What do you do with the feedback you receive?

- How will you capture qualitative feedback & ideas?
- Where will you document the ideas shared?

• Transparency — How will you reflect key insights learned?

- Will leadership be informed of key insights learned?
- Who will be accountable for following up?

Inclusivv Tip:

Be intentional about measuring the results.

It's important to have a clear result-tracking strategy in place from the jump. This can look like entrance and exit surveys or monthly progress reports against suggested action items.

The key is to take the conversation (its learnings, insights and impacts) beyond the event itself.

PART 2: THE HOW

#2 Clarify the Audience

It is crucial to know who your participants are so that you can best tailor the discussions to meet their specific needs. In some cases, you might have different groups of stakeholders that you plan to bring together for different conversations.

Here are some questions to think about:



What identities are represented in your organization?

What topics are most interesting to them?



What voices and perspectives are needing to be heard?

Who is interested in listening?



Who has the most to gain from being heard?

What would they like to see come out of these conversations?

Consider creating a leadership team or a committee of people who can help you determine the right mix of topics and learning objectives.

Example of groups that are typically involved in the planning process:

- Board members, C-suite, Leadership team
- ERG/BRG leaders (Employee Resource Group or Business Resource Group)
- DEI Council members, Head of DEI, Head of HR
- Talent Recruitment & Talent Development leaders
- Learning & Development leaders or Training & Development leaders
- Young professionals, rising stars, promoted people leaders

Key questions to consider when you're thinking about the mix of these audiences:

- Do they play well together?
- Do they have similar or competing agendas?

Inclusivv Tip:

Leadership buy-in is absolutely critical to the success of your conversations.

Not only will support from higher-ups streamline your planning and execution, it will also raise the stakes in a way that compels everyone to participate and take action.

When company executives see their employees rallying around an issue and beginning to address the issue in a constructive way, they are more likely to implement the necessary steps to bring about change.

The reverse is also true. If leadership is not bought in, beware. They have little incentive to engage in any outcomes or really hear the voice of their employees.

PART 2: THE HOW

#3 Set the Intention

With your audience in mind, there are three things to consider when selecting the topics and designing a learning journey for your courageous conversations:

- The group identity as a collective
- Where the group believes it's starting from (maturity and familiarity relating to the topic)
- Where the group is interested in going together (what action it aims to take afterwards)

For example, if your goal is to bring people together from different sides of a divisive topic, it is crucial that you do not isolate potential guests by using biased language that leans to one side. Make sure that all wording related to the event – from invitations to questions asked – is balanced. There is power in bringing people together with a common goal of understanding, not necessarily agreement.

Common intentions from Inclusivv conversations include things like:

- Creating a stronger sense of belonging among colleagues
- Getting to know colleagues on a much deeper level
- Creating a safe space to hear different perspectives
- Walking away with a better understanding of the issue
- Learning new insights and sharing lived experiences
- Feeling empowered to take action personally and professionally

Inclusivv Tip:

Don't try to solve every problem in one conversation.

It's tempting to want to solve all the world's problems when you get really smart, caring people together all talking about issues they care about deeply.

But that's the reason why consecutive conversations or sequencing can be really powerful, and can help build trust and commitment over time.



PART 2: THE HOW

#4 Determine the Frequency

Knowing your audience and your intention will help determine the right frequency. For large sized organizations, quarterly tends to be the preferred option, especially if the entire company is expected or encouraged to attend. Keep in mind, online conversations can hold 300–500 people at a time with breakout rooms.

However, for mid-sized organizations, having monthly conversations may be the perfect balance to attract a different audience for different topics, or perhaps invite ERGs to go through the same topic, or one function or department at a time.

It's a balancing act for sure, considering time, resources and employee availability. Once you've honed in on the specific issues you're trying to target within your company or organization, start with something reasonable and remember that you can always adjust frequency down the line. You've always got next year, and the next.

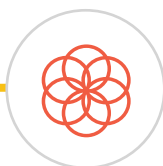
Inclusivv Tip:

Quarterly Conversations is the preferred frequency.

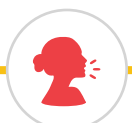
We recommend hosting conversations at least quarterly. This optimizes stakeholder engagement, offering enough time for necessary reflection but keeping the momentum going for meaningful action.

It's also better to have everyone in the same room, whether that's a digital room or a physical room to make the experience more impactful.

Quarterly conversations are most common and the minimum if the intention is to have continuous learning.



Bi-monthly conversations are great to spotlight specific affinity groups throughout the year, like ERG groups.



Monthly conversations can be highly targeted to cultural heritage month celebrations or specific groups.



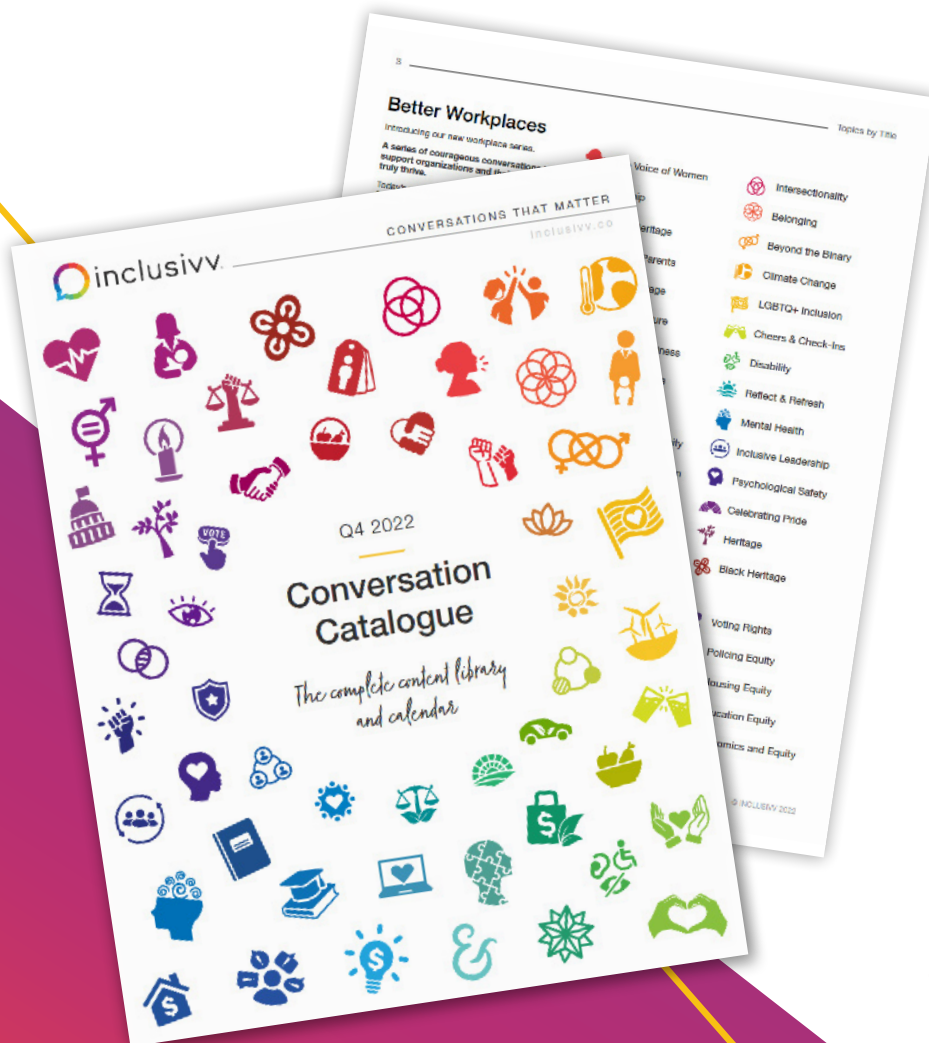
PART 2: THE HOW

#5 Structure the Conversation

Unlike unstructured conversations, which require highly trained facilitators to ensure the conversation stays respectful and productive, structured conversations go well with the right preparation.

Our structure of three big questions guide participants, help them stay on track, and take everyone on a shared learning journey. The aim is to have people walk away feeling hopeful and empowered with the knowledge and empathy needed to take action.

The most effective conversations are the ones that take guests on a journey – where guests are encouraged to share personal stories as well as challenges, ideas and strategies for the future. It's the structure that provides the scaffolding to make this journey possible.



Inclusivv Tip:

Meaningful structure makes a difference.

Our Inclusivv conversations follow the Marshall Ganz theory of public narrative and include three stories:

- The Story of Self (heart)
- The Story of Us (head)
- The Story of Now (hand)

Each conversation is a powerful shared experience that is bound to move hearts, expand minds and inspire action.

For the complete library of conversation topics, download the Inclusivv Conversation Catalogue.

PART 2: THE HOW

#6 Overcome Fear

We get it. We completely understand how much courage it takes to recommend to leadership that you think your company should engage in courageous conversations and encourage employees to talk about critical topics that are most-often deeply personal.

For those in leadership positions all the sirens of “what if” start to bubble up and the fear of the unknown can sabotage the possibility of courageous conversations before anyone even opens their mouth.

Here are the most common “What if’s” and fears that go with them and how you can respond to them:

- **What if someone says something that makes us look bad?**

It’s really hard to speak truth to power, and if there is a feeling brewing among employees, wouldn’t you want a safe space for it to bubble up, rather than having it explode at another time? One of the best reasons to engage in courageous conversations is to instill a value of psychological safety, where people can speak up about ideas and give feedback when they have a different perspective, and not be punished. Instead of squelching dissent, we encourage people to embrace healthy conflict, and learn to share different perspectives respectfully. And if there is in fact something uncovered that should be addressed, you’ll be grateful it came up now and can use it as an opportunity to model authentic leadership, and address the issue directly.

- **What if we commit to conversations and no one shows up?**

This is all part of being vulnerable, and it takes courage to commit to creating space for authentic sharing. This fear is so natural, and can be overcome by being intentional about how you position these opportunities and invite participants. (See next tip on engagement)

Inclusivv Tip:

Do a small pilot.

The best way to overcome fear is by just doing it. Once you are ready and have selected a topic, gather a small group and mix of people who are on the leadership team, as well as those who are new to this, and get their honest assessment after the first conversation.



PART 2: THE HOW

#7 Engage Participants

In a world where everyone is busy and time is money, here are some effective ways to get people to show up for conversations.

- Show authentic commitment from leadership**
 If leadership is on board, it's way easier to get everyone else on board, especially if it will make them look good in the eyes of leadership. Have the CEO and/or most admired leader share how important it is to come together for these conversations. And make sure they attend the first conversation.
- Give permission to fully participate**
 Having leadership say why it's important to take time out of the day (on company time) to talk about these issues gives people permission to set aside their goals (momentarily) and be 100% present. But if leadership only gives lip service and never shows up, then it sends a signal that these conversations are just for those who have the time, rather than those who make the time.
- Frame why it matters within the context of your mission**
 People want to work for leaders who care. Let your employees know that you want to hear their voice and you want to create safe spaces for them to grow personally and professionally.
- Recruit internal influencers to spread the word and stir buzz**
 You know who they are. They are the glue to the organization. The ones who know everyone's birthday and checks in on people just because. Get them excited about building community and have them personally invite others to join.
- Have a communications plan that feels personal**
 It's imperative that you have a plan for getting the word out. Maybe you share the event in your company newsletter, or maybe you create more personalized invitations and share them with each employee one by one. Most people show up because they were invited by someone they admire and trust.

Inclusivv Tip:

Make it FUN!

Fun fact. Inclusivv is formerly known as "Civic Dinners" and even though Covid cancelled dinner, there is still so much power in bringing people together for food and conversation.

One way to pretty much guarantee participation is to offer an in-person gathering and provide food, drinks and good times.



PART 2: THE HOW

#8 Prepare Facilitators

Effective conversations are structured, and usually facilitated by one or more people. Facilitators need to be prepared to lead discussions on potentially difficult topics. Prep your facilitators in advance with the questions to be asked, and best practices for keeping the conversation on track.

Our team at Inclusivv can certainly host for you, but the more sustainable and scalable option is for us to train a number of your internal employees on how to host with our [Facilitator Training](#). Anyone can learn how to be an effective host, no matter their title.

Typically we train a combination of people-leaders, HR managers, DEI leaders, L&D managers, team leaders, and those who are simply eager to learn how to engage in more constructive dialogue around important issues. It's also a great opportunity to offer professional development to rising leaders.

After hosts are prepped, they should be able to:

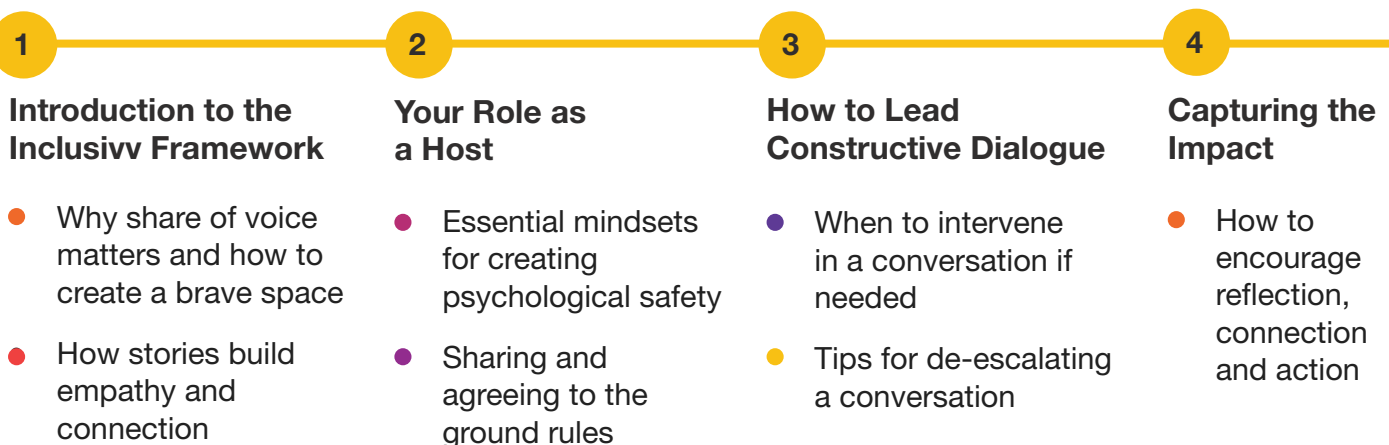
- Host any Inclusivv conversation with confidence
- Describe the ground rules of an Inclusivv Conversation
- Clearly define the role of the host and what to expect
- Demonstrate curiosity, critical thinking and vulnerability
- Recognize when to intervene in a conversation if necessary
- Appreciate perspectives from those who hold different views
- Encourage reflection and commitment to action afterwards

Inclusivv Tip:

Happy hosts are well prepared.

We recommend meeting with conversation facilitators well before the scheduled event to go over details and answer any questions. Offer them a script to read from for easy hosting, and discuss steps they can take to refocus the conversation if it goes off track.

The Inclusivv host training curriculum includes:



PART 2: THE HOW

#9 Establish Structure

What makes a courageous conversation work is the establishment of ground rules and agreement to follow the structured conversation. Here are the elements of that make Inclusivv conversations powerful:



Conversation
Host



Small Group
Gathering



Structured
Conversation



Equal Time
to Share



One Voice
at a Time

Naturally, some attendees will be more vocal than others; however, it is crucial to invite introverts and more soft-spoken guests to participate equally in the conversation. Attendees reach a new level of psychological safety when they know their voices will be heard, and this ultimately leads to a more productive discussion.

Clearly stating ground rules before the discussion ensures that all guests participate in the conversation with the same baseline of respectful engagement. Here are the ground rules we believe are fundamental to open and honest conversation:



Be curious.

Lean in with curiosity and aim to learn something new.



Be vulnerable.

Acknowledge the courage it takes to share one's story.



Be authentic.

Speak from lived experience and suspend judgment.

Inclusivv Tip:

Round Robin style.

We recommended running the conversation round-robin style, where each guest has equal time to share, and can call on the next person to share if they're ready.

PART 2: THE HOW

#10 End With Action

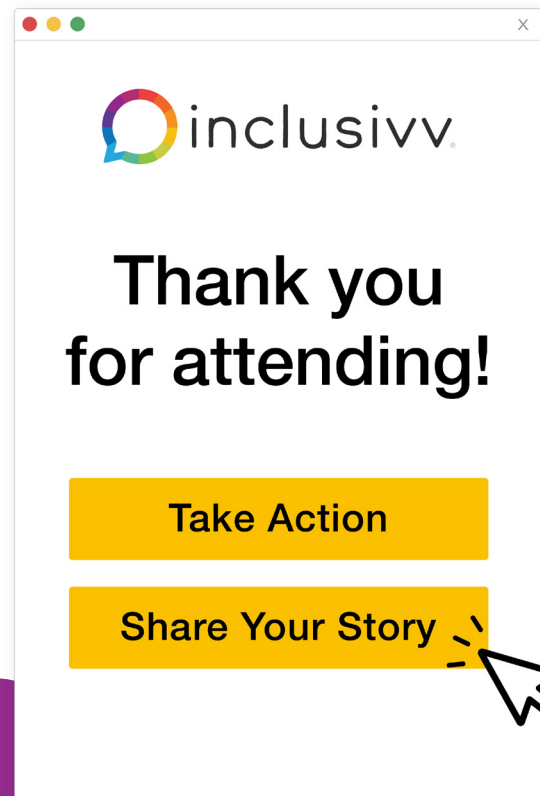
If your conversation is successful (and, by using this guide, we are confident it will be!), guests will leave feeling fired up and ready to take action. It's a great idea to end the discussion with a clear call to action that empowers guests to take what they have learned in the conversation and apply it in the workplace and their communities.

Be sure to send a follow-up with next steps and ways people can continue the conversation, share their feedback with you, or take specific actions.

Follow-up can make a big difference. Thank attendees for having the courage to engage in deep dialogue, and invite them to continue these conversations. These should not feel like one-off events, but rather part of a practice and routine.

Examples of follow-up actions:

- Share your feedback via a survey
- Sign up to attend the next conversation
- Sign up to host your own conversation
- Explore these additional resources
- Commit to being a mentor
- Commit to a specific action
- Share your reflections
- Connect with people you met
- Tell someone about your experience
- Post about your experience on social



Inclusivv Tip:

Suggest actions that are specific and achievable.

It's easy to overwhelm people. So keep your preferred actions simple and prioritize the ones that are most important.

PART 2: THE HOW

#11 Report Key Outcomes

We understand that gathering feedback and qualitative data is essential, but in today's data-driven world, quantitative insights are just as important. That's why we've created the Inclusivv platform – a powerful tool designed to help you collect valuable information after each conversation. With Inclusivv, you can transform your event management process and supercharge your reporting efforts.

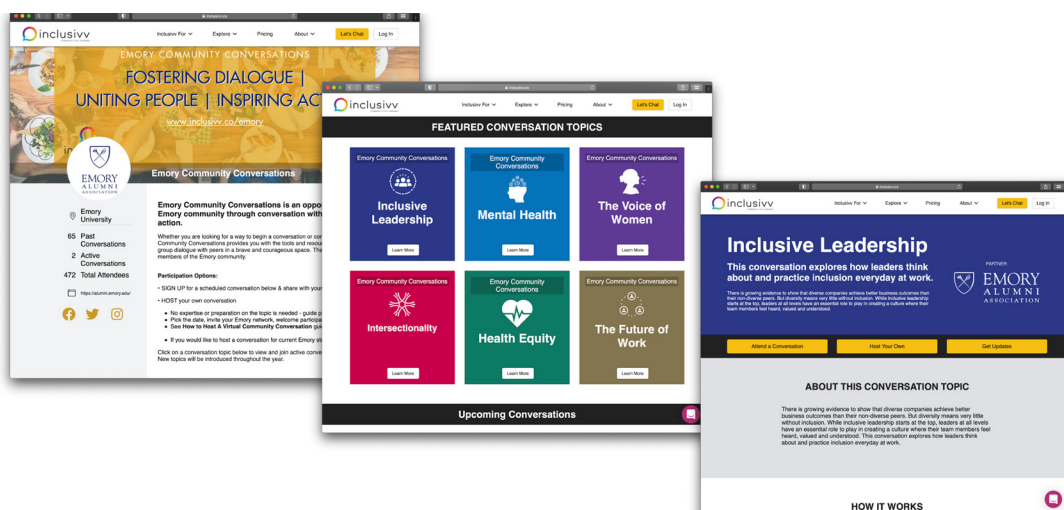
Our plug-and-play technology takes the hassle out of event management, allowing you to focus on what truly matters – bringing diverse voices to the table. By blending peer-to-peer learning strategies with cutting-edge technology, Inclusivv offers an inclusive space to engage, reflect, connect, and drive action.

With the Inclusivv Platform you can:

- Manage and monitor everything from your admin dashboard
- Track registrations and attendees for every conversation and event
- Control branding and messaging with private label capabilities
- Configure host settings including in-person, online, private or public access
- Capture valuable insights and perspectives through actions and surveys
- Track both quantitative and qualitative data from participants
- Feel supported with a dedicated Success Manager and user support

Inclusivv Tip: Make reporting easy.

With our platform, effortlessly track both qualitative and quantitative data, so you can tell a complete and compelling story in your reports, and focus on what truly matters – fostering meaningful conversations.



It's not easy

Even with these tips, we understand that facilitating courageous conversations is... **tough**.

Your company or organization may not have the bandwidth to run the process from scratch.

You may feel under-equipped to do the preliminary legwork:

- conducting in-depth topic research
- formulating productive, unbiased questions
- planning and executing group events

Many obstacles may deter you from delving deeper into the conversation space.

That's where we come in.

Meet Inclusivv.

Part 3



PART 3: MEET INCLUSIVV

Let's work together

We know that facilitating meaningful conversations is no easy feat, and we're here to help.

Inclusivv is an engagement solution that empowers companies to create positive behavior change through structured conversation.

Our technology and in-house conversation design provide a simple framework for discussion on complex issues, helping teams connect over shared experiences, common goals and collective dreams for a more inclusive world.

We work with purpose-driven brands and companies to engage employees in conversations that matter.

It's time to be Inclusivv.

Every third Thursday each month at 11:00 a.m. ET we host an Inclusive Leadership Journey conversation for our members that we open up to the public to have a chance to experience the power of Inclusivv dialogue. Submit our guest form to join us online!

Be Our Guest

Visit us at inclusivv.co or email us at hello@inclusivv.co

