



New Dynamics

People and culture

Diversity and inclusion: a practical action guide

Identify barriers to participation and build inclusive hiring, development and everyday working practices.

Practical guidance · Worked examples · Printable worksheet

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Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Identify barriers to participation and build inclusive hiring, development and everyday working practices. This practical guide to diversity and inclusion brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Focus on the experience of work

Diversity concerns differences among people; inclusion concerns whether people can participate, contribute and access opportunities. Start with an actual process rather than an abstract campaign. Recruitment, meetings, development and promotion can each reveal a different barrier.

Ask whose perspective is missing and what would make participation easier. Do not make an employee responsible for speaking on behalf of an entire group. Offer different ways to contribute and explain how feedback will be used.

Examine decisions and access

Map how people find out about opportunities and how decisions are made. Informal nominations, unexplained criteria or a requirement to attend outside normal working patterns can exclude people without appearing in a written policy.

Use clear role requirements, accessible materials and consistent decision records. Check whether interview questions or promotion examples assess work-related capabilities. Where accommodations or adjustments are needed, provide a clear request route and review the relevant local obligations.

Turn an intention into an accountable action

Choose a specific barrier and identify someone who can change it. Describe the current process, the proposed change and how employees will know it happened. A training session may support the action but does not replace changing an inaccessible process.

Use people data proportionately. Explain the purpose of collecting demographic information, restrict access and avoid reporting small groups in ways that reveal individuals. Seek appropriate local advice on collection and use. The [EEOC employer resources](#) provide a US reference for workplace equality responsibilities.

Worked example: project opportunities

Illustrative scenario: high-profile projects are allocated through informal conversations with senior managers. Colleagues working different hours rarely hear about them in time.

The team publishes the opportunity, required capabilities and expected time commitment through a shared channel. Interested employees can express interest in writing. Selection uses documented criteria, and people who are not selected receive useful feedback. The review checks who heard about the opportunity and whether the criteria were applied consistently.

Inclusion action worksheet

- **Process:** Which everyday decision or activity are you reviewing?
- **Barrier:** What makes participation or access harder?
- **Evidence:** What have people reported, and what remains uncertain?
- **Change:** Which step, criterion or channel will be improved?
- **Owner:** Who has the authority and resources to make the change?
- **Feedback:** How can affected people test the proposed solution?
- **Review:** What would show that access improved without exposing individuals?

Avoid creating numerical targets without understanding the context, applicable rules and potential unintended effects. Review the process as well as aggregate outcomes.

Sustain the work

Publish progress in practical terms: what changed, what was learned and what remains unresolved. Include employees who use different working patterns and assistive technologies in testing.

Check that reporting concerns and requesting support are safe and understandable. If feedback alleges discrimination or harassment, use the appropriate confidential process rather than treating it as a general engagement theme. Pair this guide with the [equal opportunity policy framework](#) and [anti-harassment guide](#).

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Choose one opportunity, such as a project assignment or training place, and trace how employees hear about it. Include people with different working patterns, locations and access needs in the discussion. Ask what a person must know or whom they must know before they can participate.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Rewrite the opportunity's criteria and communication route. Check that each requirement relates to the work and can be demonstrated in more than one reasonable way where appropriate. Decide how selection will be recorded and how unsuccessful applicants receive an explanation that helps them understand the process.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Test an employee who cannot attend the usual meeting or use the standard application format. Identify an accessible route that preserves the relevant assessment criteria. Consider whether an apparently neutral deadline or informal nomination step creates an avoidable barrier. Involve the appropriate specialist for adjustments or local obligations.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Assign an owner to implement the change and a separate way for employees to report whether it helped. The handoff should explain the revised process, the reason for it and the review point. Avoid expecting members of an underrepresented group to carry all of the implementation work.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

Where should an inclusion programme begin?

Begin with a concrete barrier in a process the organisation can change. Use employee input and operational evidence to understand the issue before selecting an intervention. A focused improvement to opportunity access, meeting participation or recruitment criteria can be more useful than a broad campaign with no accountable owner. Explain what will change and how affected people will help test it.

Does inclusion require demographic data?

Some questions can be explored through process review and employee feedback without collecting new sensitive information. Other analyses may benefit from demographic data, but collection and use need a clear purpose, appropriate basis, access controls and local review. Do not collect information merely because a dashboard supports it. Consider small-group identification risks and explain how the data will be used.

How can managers support inclusion every day?

Make expectations and opportunities visible, invite contributions through more than one channel and explain decisions using relevant criteria. Notice whose work is overlooked and who repeatedly misses access to development. Listen when a process creates a barrier and use the appropriate support route. Everyday consistency matters more than asking employees to adapt silently to an unnecessarily narrow way of working.

Review the first cycle

Ask whether the specific barrier became easier to navigate and whether the change created new difficulties. Review participation and decision records with appropriate privacy controls. Keep the findings grounded in the process; avoid claiming a broad cultural transformation from one activity or a small change in an aggregate measure.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

[New Dynamics](#) connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete [guide library](#) for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation's approved records. This page is for your own working notes.

Process: Which everyday decision or activity are you reviewing?

Barrier: What makes participation or access harder?

Evidence: What have people reported, and what remains uncertain?

Change: Which step, criterion or channel will be improved?

Owner: Who has the authority and resources to make the change?

Feedback: How can affected people test the proposed solution?

Review: What would show that access improved without exposing individuals?

Discuss your next step with New Dynamics: contact@new-dynamics.com