



LEADING EDGE ALLIANCE  
June 3, 2025

# ALLYSHIP & OTHER INCLUSIVE LEADERSHIP STRATEGIES

# CPE Check-in

*Scan the QR code or enter the code  
IN THE EVENT APP:*

**UNLOCK4**

VS







“

There is one sin which I have come to fear  
above all others: ***Certainty.***

***Certainty*** is the great enemy of unity.

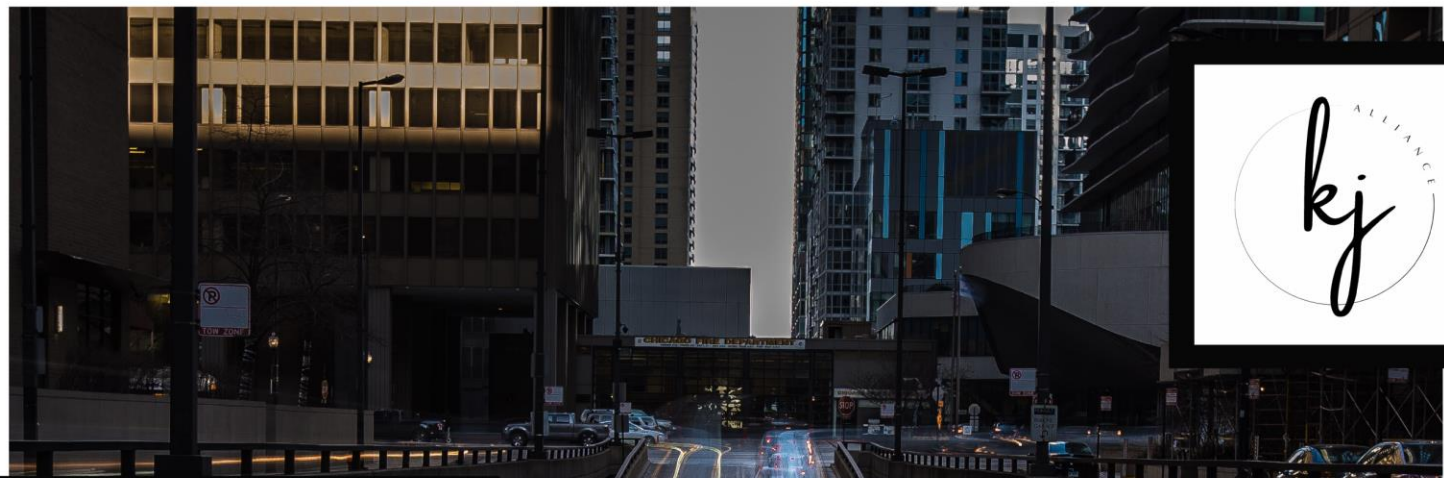
***Certainty*** is the deadly enemy of tolerance.

Cardinal Lawrence  
CONCLAVE



# Certainty Nearly Derailed My Career





The illiterate of the future are not those who cannot read and write, but those who cannot ***learn, unlearn and relearn.***

- ALVIN TOFFLER



What might you need to unlearn and relearn so that you can engage and retain top talent in your industry?

# The State of Talent in Finance & Accounting

## The Shortage of Talent



More than half of financial-related jobs are unfilled



Accounting graduates dropped by the largest single-year percentage in more than a decade

## Consequences



Inflated salaries



Financial reporting impacted



CPA firms turn away work

## Call to Action



How can you gain a competitive advantage to capture top talent?



# The Case for Allyship and Inclusive Leadership



# Rethinking Talent Retention

## MASLOW'S HIERARCHY



### SELF-ACTUALIZATION

- ✓ Connect with something bigger than ourselves
- ✓ Life build on meaning and purpose

### BELONGING

- ✓ Being part of a community
- ✓ Building meaningful relationships

### SAFETY

- ✓ Security
- ✓ Food, Shelter, Clothing

Recreated from Garton, Eric and Michael Mankins, 2015.

“Engaging Your Employees Is Good, But Don’t Stop There.” Bain Consulting



# Rethinking Talent Retention

## MASLOW'S HIERARCHY AT WORK

CREATE INSPIRED EMPLOYEES



### INSPIRED EMPLOYEES

#### INSPIRED EMPLOYEES

- ✓ Get meaning and inspiration from company mission
- ✓ Inspired by leader in the company

### ENGAGED EMPLOYEES

#### ENGAGED EMPLOYEES

- ✓ Are part of an extraordinary team
- ✓ Have autonomy to do their jobs
- ✓ Learn and grow every day
- ✓ Make a difference

### SATISFIED EMPLOYEES

#### SATISFIED EMPLOYEES

- ✓ Have a safe work environment
- ✓ Have the resources to do the job well
- ✓ Get jobs done without excess bureaucracy
- ✓ Are valued and rewarded fairly

Recreated from Garton, Eric and Michael Mankins, 2015.

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# INSPIRED EMPLOYEES



**PRODUCTIVE OUTPUT**

**SATISFIED  
100%**

**INSPIRED EMPLOYEES**

PRODUCTIVE OUTPUT

**DISSATISFIED**  
71%

**SATISFIED**  
100%

**ENGAGED**  
144%

**INSPIRED EMPLOYEES**



PRODUCTIVE OUTPUT

**DISSATISFIED**  
71%

**SATISFIED**  
100%

**ENGAGED**  
144%

**INSPIRED**  
225%

**INSPIRED EMPLOYEES**

**87% less likely to leave their organization**

**25% to 65% LOWER ATTRITION**  
COMPARED TO ENGAGED EMPLOYEES

# WHY LEADERSHIP MUST EVOLVE

## The Workforce Is Changing

- Generational shifts
- Changing priorities about work
- New ways to works

## Workers are looking for...

- Autonomy & flexible work
- Fairness and inclusion
- Human-centered leadership
- Purpose-centered orgs
- Investment in overall well-being
- Investment in career path







## WHAT IS NEEDED

Allyship and inclusive leadership as a strategy to engage and retain top talent in new workplace contexts

Leaders managed their employees in ways that led to creating satisfied employees

## WHAT'S IN THE WAY





# WHAT IS ALLYSHIP?

**DEI Definition:** The practice of emphasizing social justice and inclusion by members of an in-group to advance the interests of an oppressed or marginalized out-group

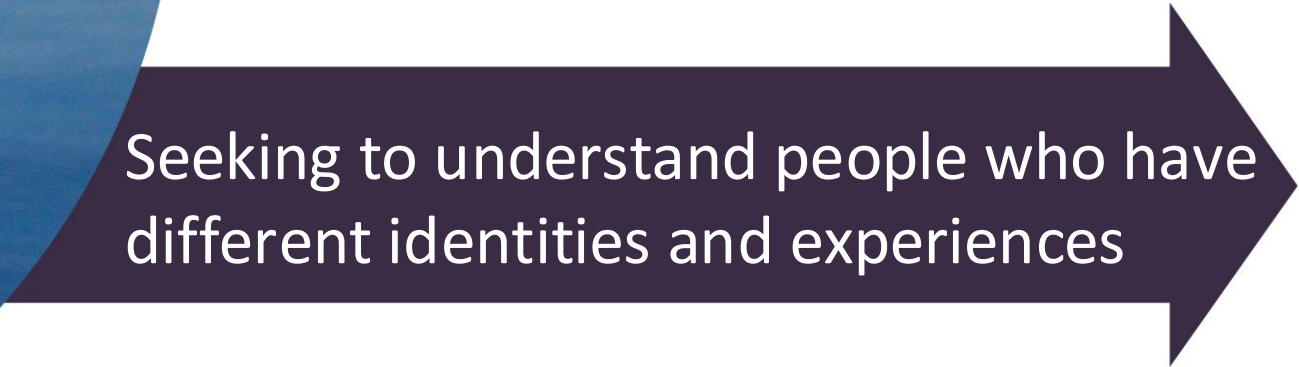
**Expanded Definition:** Developing an understanding of groups with different backgrounds and experiences to create stronger alignment, perspective sharing, and connection





# Ways to think about Allyship...

Correcting the *imbalances between groups* with different experiences and identities to create *more inclusive environments* where everyone can thrive



Seeking to understand people who have different identities and experiences

# INCLUSIVE LEADERSHIP

Empathy

Flexibility

Coaching

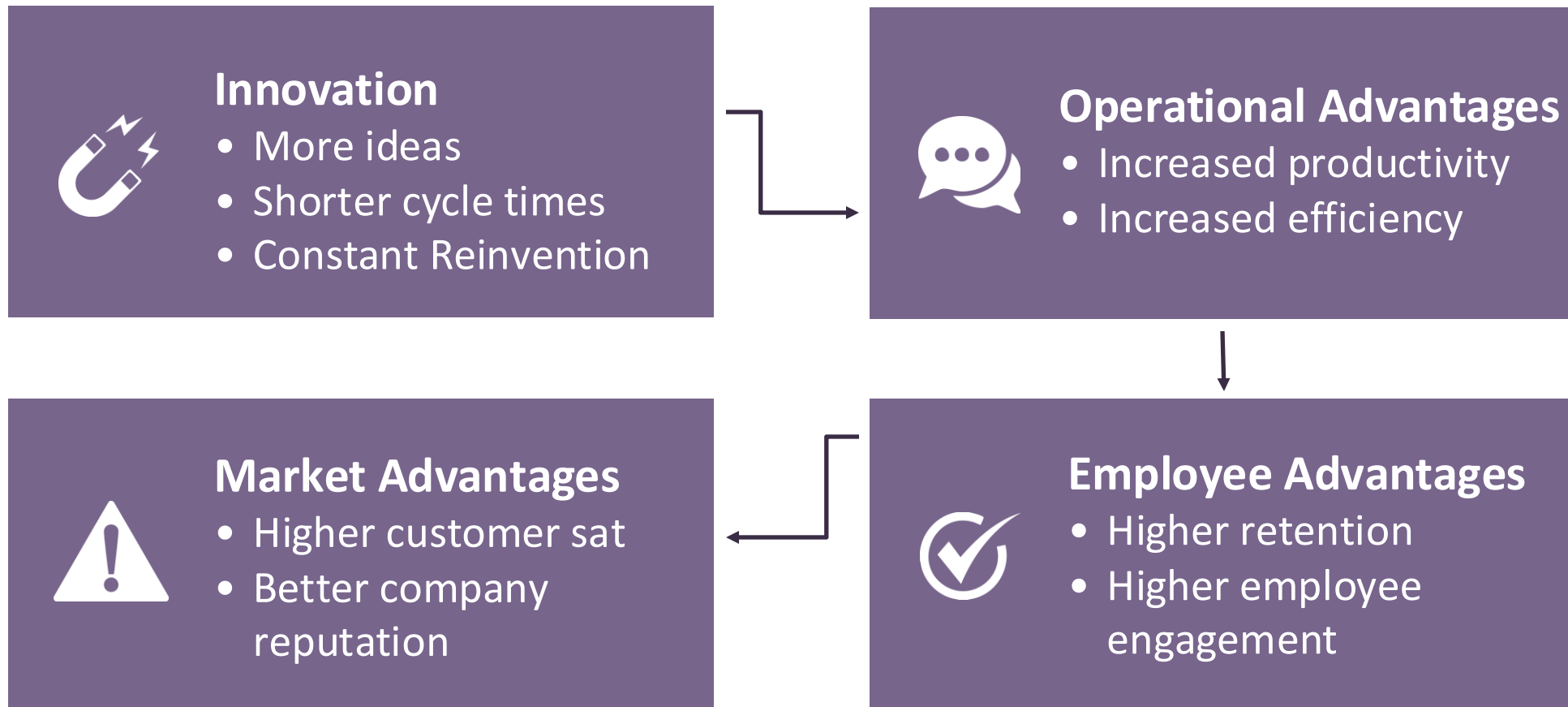
Wellbeing

Cultivating Critical  
“Soft” Skills



Source: Gartner, 2021

# Benefits of *Allyship & Inclusive Leadership*



Sources: "3 Diversity Recruiting Strategies: Lessons from Lyft's Talent Acquisition Team," eBook by Teamable, Lyft, and Green house; "Inclusive Mobility: How Mobilizing a Diverse Workforce Can Drive Business Performance," Deloitte, 2019; "What Workforce Diversity Means for Millennials," Reva Nelson, Monster.com.



# Four Strategies to Stand Out as an Inclusive Leader and Ally

## **EMPATHY & ADVOCACY**

Perspective taking to build Allyship

## **WELLBEING & FLEXIBILITY**

Bridge the gap between employee expectations and employer offerings

## **PSYCHOLOGICAL SAFETY**

For building trust that enables workers to show up authentically

## **COACHING**

Engage with your employees as a coach





Extend empathy  
*in both directions*

Sponsorship, mentorship,  
and reverse mentorship

Advocacy to level the playing  
field

**BUILDING ALLYSHIP**  
THROUGH EMPATHY & ADVOCACY

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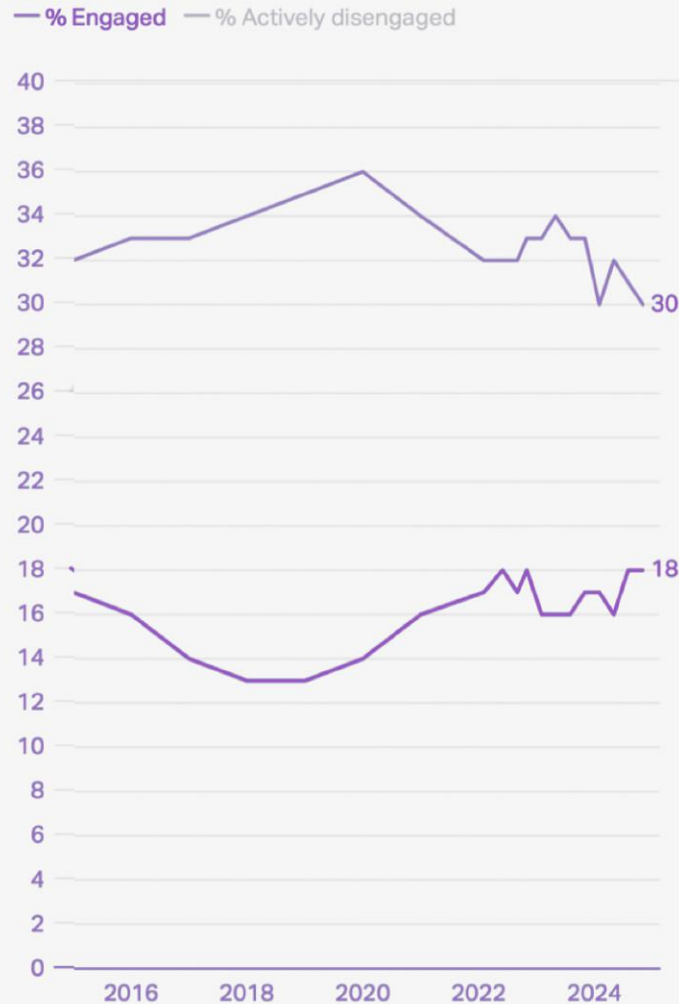
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## **COACHING**

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## US EMPLOYEE ENGAGEMENT TREND

## ENGAGEMENT CHALLENGED BY MACRO CONDITIONS

Employee engagement at 10 year lows, driven by

- DEI policy rollbacks
- Return to Office mandates

2015 - 2024 - Source: Gallup



# Closing the Gap between in Employee Expectations & Employer Offerings

## ✓ Diversity and Inclusion Policies

67%

of younger job candidates that want to join a diverse team

## ✓ Flexibility

### While Workers Want Flexibility, Employers Demand Return to Office

CEOs who believe that there will be a full return to office 2026:

64%

Employees globally who want to work remotely at least some of the time:

92%

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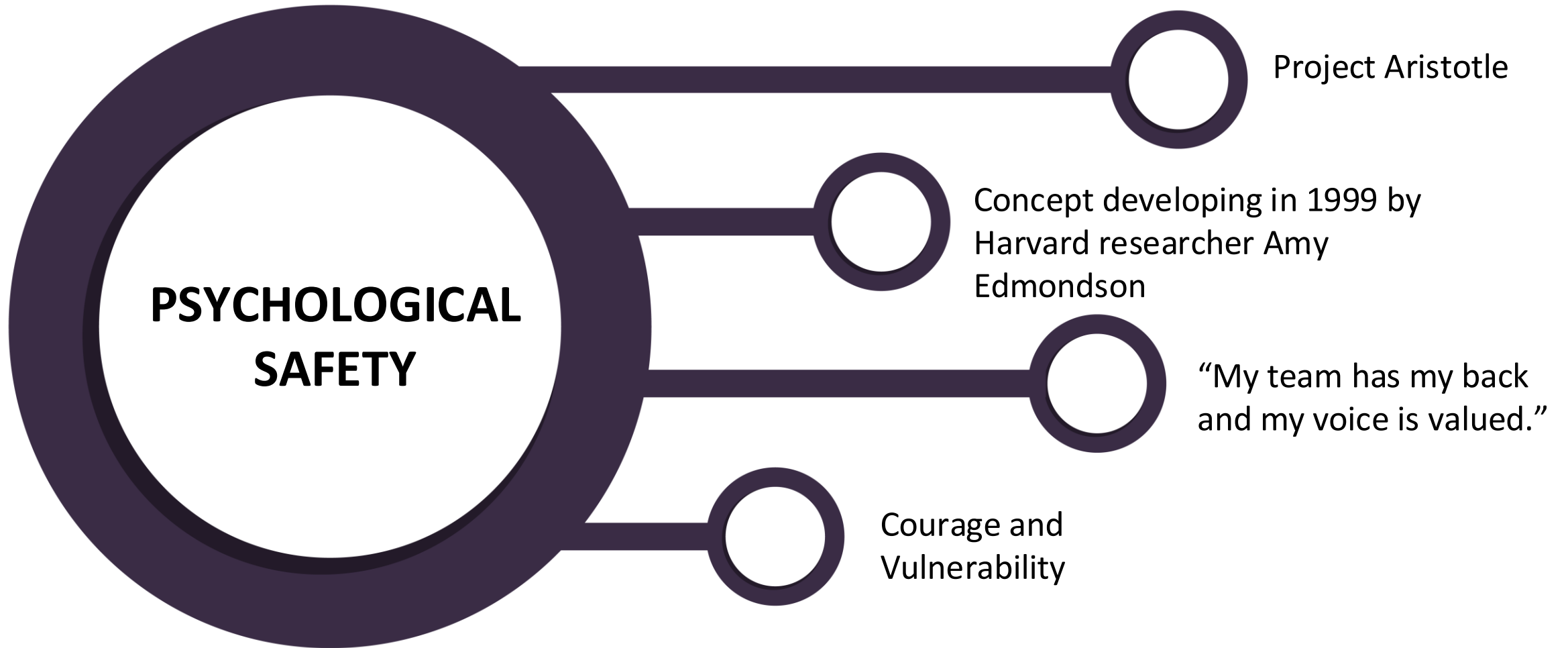
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# PSYCHOLOGICAL SAFETY





# 5-MINUTE PSYCHOLOGICAL SAFETY AUDIT

- ☐ If you make a mistake in this team, will it be held against you?
- ☐ Is it safe to take a risk on this team?
- ☐ Do the people on this team sometimes reject others for being different?
- ☐ Are the members of this team able to bring up problems and tough issues?
- ☐ Is it difficult to ask other members of this team for help?
- ☐ Would anyone on this team deliberately act in a way that undermines others efforts?
- ☐ Are unique skills and talents valued and utilized?





## 4 WAYS TO CREATE PSYCHOLOGICAL SAFETY

- Make it an explicit priority
- Establish norms for how failure is handled
- Facilitate everyone speaking up
- Embrace productive conflict

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# ENGAGE YOUR EMPLOYEES AS A COACH

**MANAGER**



**EMPLOYEE**

Invest in career development

One meaningful conversation / week



A person is seen from behind, walking along a narrow, rocky ridge on a mountain. The ridge is covered in sparse vegetation and rocks. The mountain slopes down on both sides, with a valley visible in the distance. The sky is filled with large, dark, dramatic clouds, and the lighting suggests either dawn or dusk, with a soft glow on the horizon. The overall mood is one of adventure and challenge.

**Where are you on your Allyship  
and Inclusive Leadership Journey?**

# Allyship: DEI Definition



**Florida teacher Melissa Calhoun fired for using student's preferred name without parents' consent.**



**'If she's not paid the same as the men, I'm not doing it.'**

**Benedict Cumberbatch**  
MELROSE

**Projects where female actors are paid less than male counterparts should be rejected, he says.**





# Expanded Allyship

**Taking action in the absence of formal policies**

- Extend empathy & advocacy
- Build psychological safety
- Close gaps between employee expectations & employer offerings
- Coach and invest in employees
- Actions to counter bias
- Leveling the playing field



## A CHALLENGE

What *action will you take* to build a more inclusive leadership style and to be an ally?



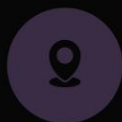


**With Challenge Comes  
Opportunity**





THANK YOU



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