7 Steps to Set Your Employee Resource Groups Up for Success

You might already know that Employee Resource Groups (ERGs)* are volunteer employee-led groups within organizations whose goals and mission align to a specific group or focus. And you also might know that ERGs can provide an organization with a wonderful sense of community, cross-cultural and group education, and provide an outlet for leadership training and networking.

But do you know how ERGs contribute to an organization's Diversity, Equity, and Inclusion (DEI) or Diversity, Inclusion, and Belonging (DIBs) efforts? And how aware are you of the challenges of building one group or a strategy behind multiple groups?

That is what we will seek to share here. Building an ERG (to say nothing of building an entire ERG program) is much like building a consumer-grade product - there will be mistakes and challenges to overcome, coupled with the successes that make it all worthwhile.

In this article, my hope is to present a straightforward "how to" guide that will pose challenging questions and provide lessons learned - all in the spirit of making your journey toward ERG creation (and enhancement!) better and easier. This guide includes seven steps.

1. [Identify your why](#)
2. [Build your coalition](#) (...of truly dedicated volunteers and sponsors)
3. [Define roles and responsibilities](#)
4. [Execute](#)
5. [Execute](#)
6. [Execute](#)
7. [Review and refine](#)

Before we actually dive into these, you might notice that execution is listed three times. This is not an accident.

Assuming you have identified your why, built a coalition of deeply engaged colleagues and sponsors, and articulated who does what (and why!), **execution is THE most important aspect**. None of the ERG leadership team gets paid to do this work. You don't want the official Diversity, Equity and Inclusion (DEI) team running this because you need people who are not working on behalf of the organization to launch this group. You need volunteers whose motives are true and independent from organizational leadership. And while your official DEI team can and should support your efforts with enterprise-wide efforts, they can't run this show for you.

Note: you may see or use terms like "business resource group" (BRG) and "employee network group" (ENG). There does not appear to be a standard, and for the purpose of consistency, I will use the term "employee resource group" (ERG) here.

Second note: this document is written with a North American lens, which will likely not be completely applicable in other regions - that said, the fundamental steps will be broadly relevant to anyone who is looking to launch an employee resource group.

Step #1: Identify your why

Each employee resource group that is founded within a company has their own reason for launching. ERGs can form to support the needs of a variety of different groups, including but not limited to, groups organized by:

- Gender
- Culture, race, ethnicity, national origin
- Sexual orientation
- Military service
- Parent and caregiver status
- Age
- Religion or faith
- Disabilities
- Gender identity

According to a Boston College Center for Work and Family article, the first ERG was founded for Black employees at Xerox in 1970. Over time, the types of ERGs created within organizations has grown to include a variety of different identities, but the reasons for their creation are unique to each group and time period in which it was launched. It is this reason that is crucial to define "the why" up front.

For example, Asian employees in high tech organizations are overrepresented compared to the general population, but not at senior executive levels (see the Ascend Foundation's report, Hidden in Plain Sight: Asian American Leaders in Silicon Valley). Thus, the why for an Asian ERG will likely be different than the why for a Black employee group, but this does not mean the two groups will not share common goals or values (i.e. career advancement of members).

A strong example of an organizational why comes from the Colorado-based cybersecurity company Coalfire Systems, which launched a women's network (RISE – which stands for "Recruiting, Influencing, Support, and Education") long before they formalized their DEI efforts. Chalice Beam, a senior manager at Coalfire and co-chair of RISE, told me their group focuses on driving the representation and championing of women in cybersecurity roles, both inside and outside their organization. "We try to build each other up," Beam said referring to how they encourage women and their male allies.

If your organization has not solicited feedback from its employees on what types of DEI efforts they need to feel included or a sense of belonging, SAP SuccessFactors and Qualtrics can provide your HR team and business unit leaders with the insights to identify employee priorities and needs.

Step #2: Build your coalition

At the outset, it is critical to have a dedicated working group who will drive the strategy and execution of your ERG. While it would be ideal to have a diverse, representative group (i.e. variety of ages and gender identities for a parents ERG, members of all branches of the military and their spouses for a Veterans ERG, or representation from South, East, and Southeast Asian ethnic groups for an Asian ERG), the critical element is to **find people whose passion for the cause and commitment to action are unquestioned**.

In addition, executive sponsorship and middle manager support along with championing from your DEI team (if you have one) will be vital to ensuring organizational support. Executives will be able to provide much needed visibility, sponsorship, and cross-organizational connections. Managers will bring experience across an organization and with respect to running teams.

If you find yourself without people who look/sound like you in your company's executive or middle management ranks, then engage other ERGs within and outside your company for support. Obviously, it's easier to have people at your company. But when it comes to speakers, panelists, and partners, enlisting support from any source will be critical to your success.

Step #3: Define roles and responsibilities

It is important to identify how your ERG needs to work before you start asking people to take on responsibility for driving events or recruiting speakers. From an organizational design perspective, there are functional and geographical considerations to think about first.

Functional

There are several functional responsibilities you should ensure are baked into your org structure.
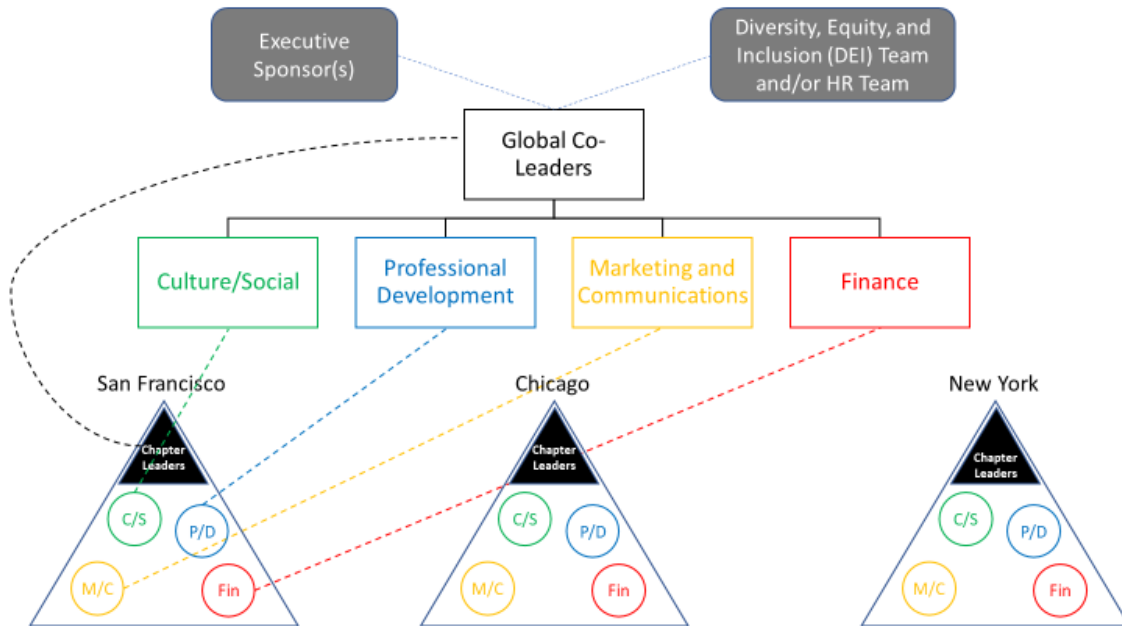
Above: A potential organizational model with direct reporting relationships (solid lines) between each pillar and the global co-leaders and indirect reporting (dotted line) between pillar and chapter leads.

As you can see above, one potential organizational model could (but does not have to!) include direct reporting from the pillar leads to the global co-leaders and from the leaders to the executive sponsors and any formalized DEI or HR team members. The four boxes (Culture/Social, Professional Development, Marketing and Communications, and Finance) would represent the executive board of your ERG. And each chapter pillar lead could connect with the Exec Board pillar lead to whom they align. The image above reflects one region (in this case, North America). If the strategy calls for a global organization, the Global Co-Leaders would be responsible for engaging each region and coordinating with those leadership teams as well.

- Leadership
  - It usually helps to have one or two co-leaders whose responsibilities include interfacing with the dedicated DEI team (if it exists) and other ERG leaders, setting the direction and agenda of the team, and securing the budget and key executive sponsors.
- Culture/Social

- - Whereas this used to focus exclusively on cultural holidays, networking mixers, or speakers, Covid-19 has brought about a number of additional topics to the fore including racial justice, allyship between ERGs, and [intersectionality](#) (the theory that you are a combination of a variety of social and political identities).
- Professional Development
  - Mentoring programs, career development, executive speakers, learning offerings for soft and hard skills are just a few ways to provide professional development opportunities. This appeals to business leaders who want to ensure there is a return on investment (ROI) for the resources committed to ERGs, but also provides a key draw for people who are seeking career advancement.
- Marketing/Communications
  - This includes responsibility for mailing and distribution lists, membership lists, newsletters, social media and engaging the members. This is a vital function that enables people to learn more about what events are coming up.
  - Marketing may be separated from Communications if you have the people and expertise. Or you can merge them together if you're running lean. But regardless, you need to ensure that employees in your organization know about your ERG.
  - If this person or people have some design/creative experience or Photoshop/Designer/Illustrator skills, it makes it easier to share collateral across all messaging channels.
- Finance
  - Assuming your ERG has a budget and funds to spend, this function is important to build into an organization so that spending is appropriately distributed across the chapters/team.

While there are no rules on who should serve in each of these roles, credibility is an important characteristic to identify in any potential board member, leader, or key member. I have seen younger, less experienced people thrive in some of these roles and I have also seen people stumble when they assume they know it all. It is important for all ERG leaders to keep a growth mindset and seek out insights as they pertain to their group, cause, and role.

Geographical

Diversity, Equity and Inclusion can look different depending on which part of the world you are in. The key to launching a global ERG is to begin with a region (or regions) where you have critical mass of volunteers and sponsors.

- If you have launched in the United States, for example, focus on defining the model for the country while leaving room for flexibility or expansion if and when your ERG grows to Europe, Asia, Latin America or other parts of the world.
- Given that there is not one perfect model, answer some of the following questions to determine what geographical model works best for you:
  - How will regions (i.e. North America, Latin America) coordinate or collaborate with other regions when it comes to programming or communication?
  - Do employees work remotely or sit in physical offices? Covid-19 is disrupting many expectations around in-office activities, so will you need to be a virtual-event-centric org?
  - Will in-person events come back when people return to offices?
  - For companies with physical presence, do you need local office chapters? (see above for functional elements that might make sense for chapters)

If your organization does not currently utilize [HR Analytics and Workforce Planning](#), consider requesting a demo from one of our SAP SuccessFactors teammates.

Steps #4-6: Execute, Execute, Execute

You thought I was joking about execution being listed three times, didn't you?

Launching an organization, hosting events, bringing people together, recruiting speakers and attendees... it's exhausting work. So, as you and your team begin to execute, keep in mind some questions that apply to everyone (including leaders, members, sponsors, etc.):

- Tools
  - Do you have a common shared file location to store documents? Consider Microsoft OneDrive, Box, Dropbox, or any other tools your company may use.
  - Do you have a mailing list set up by chapter and a collective mailing list of everyone who is a member or is interested?
  - Do you have a website, intranet site, or some other place where people can find out more information about your group/leadership/events? ([SAP Jam](#) is one potential tool you can use)
  - How do you organize which events you are planning or have confirmed?
  - How will you handle event registration, so someone is not having to organize manually in Outlook or Excel? (Consider Eventbrite or other similar tools)
- Events
  - In-person? Virtual?
  - With or without food/drink?
  - Do you need physical space to be able to do it?
  - How far in advance do you need to reserve that space?
  - Is there an A/V set up?
  - Will you do a live event in one city and let people remote dial in to watch/listen using Zoom, Microsoft Teams, BlueJeans, Skype, or another virtual communications tool?
- Networking
  - Are all of your business units, functions, or offices represented when you bring people together?
  - Is your membership concentrated or overrepresented in one area, gender, age range or other background?
  - What's in it for your members?
    - Many Veterans groups provide resources to service members who may transition from the military with disabilities or other challenges, in addition to reminding their members that transitioning veterans and military spouses receive [a free 1-year LinkedIn premium membership](#).
- Speakers
  - Who do you want to have as a speaker at an event? Is it a celebrity or renowned speaker? Is it a company executive? Is it someone who is not well known, but has a great topic to talk about?
- Cross-ERG collaboration
  - With which ERGs do you want to collaborate?
  - How will your ERG lead that effort or partner with other groups to host events?

- Budget
    - How will your chapters or functional teams request budget?
    - Is there a process, due date, checklist and limit to how much funding is available per event or overall?
    - What will you prioritize in terms of programming or costs?
- Measurement
    - That which gets measured, gets done--in theory. But in practice, understanding what metrics your organization needs or can track is a critical measure of success. Denise Reed-Lamoreaux, Global Chief Diversity Officer of the French IT company Atos, shared that she focuses on measuring who has completed learning series and achieved internal certifications, which she is then able to connect to a country and line of business level to prove impact. How will your impact align to your DEI team's key measurements?
    - What is the key impact you seek to measure? Is it talent representation, engagement, retention, or something else? Determine for your own organization what matters with your measurements (and what happens when those measurements go up or down?).

Step #7: Review and refine

If you are at this point, congratulations. You have likely started something, made some mistakes, and more than likely had some wonderful experiences shared by your members and leadership team. The power in this journey is not one event but the journey itself – one in which you will enable conversations and learning. Some important things to remember:

- Members are volunteers, not direct reports
    - You can't treat people like employees when they are doing this as volunteers. Solicit their input. Get their buy-in. Motivate them through influence, not authority (because you have none). And remember to recognize and reward your peers for their efforts, both publicly and in private.
- Getting things done is critical to short term success
    - Momentum begets momentum. If you can find action-oriented people to work with up front, your team will be much likelier to succeed.
    - [Michi Everett](), a co-chair of Coalfire Systems' Becoming ERG (which focuses on Black employees and was launched in 2020), reminded me that during the first year, it is vital to "stay in communication with core leadership. If you set a goal to meet monthly, meet it. It keeps communications going and everyone knows their part is vital. You may come to the table for your ERG with a wealth of ideas - you want to do everything. Establish attainable goals early and be SMART. Don't try to do everything within the first year."
- Succession planning is critical to long-term success
    - It's not about one event or even a year's worth of events. Will your organization survive or thrive after the founding leadership team has turned over?
    - How are you giving a new generation of leaders a chance to learn, to grow, and to display their passion for a group, a cause, or a mission?
- Business impact is critical
    - [Sarah Winawer-Wetzel](), currently of the University of Pennsylvania Health System, shared with me her experiences with the LGBT group in a previous role at the Dana-Farber Cancer Institute. In her six and a half years with the organization (and the ERG), her leadership team provided their HR colleagues with advice on how to create a Health Equity Index to measure how the organization was treating patients and staff. They also counseled company leadership during the days after the Pulse nightclub shooting in Orlando and helped plan an event within three days to give the company leaders a chance to connect with employees who had been affected.

Conclusion

There are going to be many challenges you and your organization will face in building up your ERG strategy. But in doing so, you and your fellow board members and members at large will gain a tremendous amount of perspective BECAUSE of your efforts. I hope you will consider this an opportunity to help people recognize difference as a strength, to become allies, and to learn more about others.

I wish you the best of luck!

Additional Resources

Consider some of these articles if you would like to keep deepening your knowledge on the ERG space!

- [Diversity Best Practices' article on LGBTQ ERG's](#)
- ["What Black Employee Resource Groups Need Right Now" (HBR)](#)
- [ERG Resources from Catalyst](#)

About the Author

[Aaron Fung](#) is a Senior HR Value Advisor at [SAP SuccessFactors](#), where he counsels companies on broader HR strategy and transformation topics. He gained HR strategy, diversity and inclusion, and organizational development experience in previous roles at LinkedIn, Slalom Consulting, and Deloitte Consulting. Aaron also helped build leadership development programs for pan-Asian professionals as director of strategic initiatives at [Ascend](#), a nonprofit focused on developing pan-Asian business leaders in corporate America and Canada.

He was one of the founding executive board members for the LinkedIn Asian Alliance (the Asian employee resource group at LinkedIn), is the co-president of the Midwest chapter of [Ascend](#), and has a passion for developing, advising and connecting Asian professionals and ERG leaders.