

DIVERSITY & INCLUSION
HALL OF FAME

THE CASE FOR DEI
INITIATIVES IN LAW FIRMS

NATIVE AMERICAN
EMPLOYEES WANT TO BE SEEN

INCLUSION

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+ ISSUE 8

*Creating Globally
Inclusive &
Culturally
Competent
Workplaces*

**Leading the
Charge on
Implementing
Inclusive and
Equitable Practices**

FIDELITY INVESTMENTS'

Wendy E. John



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Head of Global
Diversity and Inclusion

Fidelity
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Wendy E. John is the head of Global Diversity and Inclusion at Fidelity Investments. In this role, she leads and executes an enterprise-wide strategy to create a more diverse and inclusive workplace—one that will deliver the best outcomes for the firm’s 65,000-plus associates, its customers, and the communities Fidelity serves. During her 25-year tenure, John has held multiple client-facing senior leadership roles of increasing responsibility. Prior to her current capacity, she served as the chief administrative officer of Fidelity Charitable, where she advanced programming to make philanthropic giving more accessible, simple, and effective. She has a bachelor’s degree in mathematics with a double major in actuarial science and economics from the University of Waterloo, and a master’s degree in investment management from the Questrom School of Business at Boston University.

Inclusion: As some offices are returning to the traditional in-person model, how can organizations best balance the differing needs of employees while at the same time maximizing camaraderie and effectiveness?

Wendy John: Thousands have switched roles or companies in recent years, while some have never been to their employer’s work site. These employees have a limited frame of reference for their company’s culture; Zoom might be what helps them recall someone’s name; and they might have found ways to “mask” visible and invisible differences through virtual work. So, as many transition back to in-person or hybrid work settings, we remain focused on the associate experience at Fidelity Investments. This includes an emphasis on emotional intelligence and allyship for all our associates. Being able to read the room—in person or virtually—and understand how your colleagues experience the space you share are important. And allyship is about actively and intentionally building trusting relationships

to grow confidence in, and protect the interests of, underrepresented or otherwise marginalized peers. To be effective, organizations must create leadership capacity for the social, emotional, and professional experiences employees need to thrive. Our employee resource and special interest groups have been integral to deepening a sense of inclusion across the firm, while our Allies Connection group—created by a team of senior leaders across the enterprise—help equip people managers with information about microaggressions, unconscious bias, and more. The goal is to facilitate constructive dialogue and drive positive behavioral change to improve the associate experience over time. That starts with tangible, authentic support for those within and outside an individual's sphere of influence.

IN: What do you think companies should be prioritizing in 2023 that has not been given enough attention in recent years?

WJ: Neurodivergence. In recent years, companies have focused on hiring practices to improve workforce representation among historically measured diversity categories: gender, race, and ethnicity. These programs remain critical; however, inclusion is not just about onboarding new team members with diverse skills and lived experiences. We have to go beyond what we can see and readily understand to engage those who may think and work differently than we do. And that means ensuring our leaders, recruiters, and customer-facing employees know how neurodivergence can impact interactions and how unconscious bias comes into play.

Organizations must consider how they react to and show support in the workplace, whatever the nature of the neurocognitive condition. Many neurotypical behaviors that were once considered “normal”—like making eye contact, shaking a person's hand, or using colloquialisms—don't consider that some conditions make it difficult to endure eye contact and physical touch or pick up on social cues. And the presence of those conditions or behaviors should never diminish the perceived value of what a person can



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bring to your organization. The pandemic helped employers understand how mental health issues and associated stigmas can significantly affect the employee experience. And there's opportunity for companies to give neurodiversity the same support and attention. It starts with education and awareness. We then need to formalize the tools, resources, and programs that help job candidates, employees, and customers enjoy equitable experiences and opportunities.

IN: What brought you to this work? Is there a personal motivation, a story from your childhood or past that inspired you in this direction?

WJ: I would say diversity and inclusion work found me through different experiences over the years. I've always considered myself a social scientist, and growing up in Trinidad and Tobago, I had a natural appreciation for all kinds of music [and] cultural and religious experiences. My parents also cultivated my curiosity by encouraging me to never stop learning, exploring, and doing everything possible to improve the situations I encountered by giving my very best. So, when I was given the opportunity to lead the Fidelity Investments Global Diversity and Inclusion office in mid-2020, I accepted the role out of a desire to help the firm create meaningful, authentic experiences for our associates, customers, and communities. I personally understand how important it is to feel safe and comfortable in the workplace and have worked hard over the years to create inclusive and relatable spaces for myself and those around me.

IN: Tell us about your greatest success story—and the greatest challenge you are currently facing.

WJ: I'm most proud of releasing Fidelity Investments' first *Diversity & Inclusion Report* in 2021. It was something we chose to do—for our associates, customers, and clients. Sharing our commitments, workforce representation metrics, and the programs, training, and processes we've established to strengthen our culture of inclusion was a way to thoughtfully demonstrate transparency and accountability. In doing so, we humbly initiated conversation about our areas of opportunity and established a baseline to track our progress. It was also an opportunity to relaunch our multiyear strategy and action plan. Our efforts are part of a journey, not a destination. Being transparent and accountable to those we serve helps ensure our good intentions



are paired with actions to drive successful outcomes. As I enter the third year of issuing our now annual report, I'm encouraged by our year-over-year improvement and the evolution of our thinking. And I hope, more than anything, that our desire to anticipate, react, and respond to the needs of our associates and customers continues to power progress in a meaningful and authentic way.

IN: What is the greatest challenge for DEI leaders?

WJ: Holding the line on inclusion. Building a diverse and inclusive culture is a marathon, not a sprint. Having the endurance to maintain focus, despite the emotionally and socially charged work, can take its toll. But to prevent that from happening, you must pause often and remember your why. We are working to create a better future than the one we inherited, and nothing worth having comes without effort, intentionality, peaks, and valleys. What has remained true for me is that elevating diverse perspectives helps create the best outcomes. While

I'm lucky to have "diversity" and "inclusion" in my current job title, progress will be driven by all of us, collectively. Progress isn't just about aligning success with who or what you agree with. Progress is about learning to listen to and respect perspectives you don't agree with to find a common motivation for beneficial change. An inclusive culture isn't about finding "the right way." It's learning to sit in a paradox that allows multiple, opposing perspectives to coexist, with mutual respect and a common desire to achieve a shared outcome that—at times—extends beyond your own self-interests.

IN: What will be some of the most pressing issues and challenges in the coming years for corporate diversity and inclusion leaders like yourself?

WJ: For as much perceived progress as the diversity and inclusion community has made in recent years, there's still an incredible amount of work left to do. We've become very reactive. And we're grappling with both the shifting nature of our work and the ever-expanding role we are asked to play. A peer recently referred to us as becoming the "conscience" of our organizations. Whew! That's a heavy weight to carry.

Diversity and inclusion require understanding, transparency, clear commitments, and alignment across several parties. When working to achieve the best for all, we sometimes stumble and miss the mark. Everyone won't be happy with our decisions, though we might start with that end in mind. So, as owed to my younger, curious self, I encourage my colleagues to listen, reflect, pause, and then act. The more we listen and learn before endeavoring to ally through action, the more our intentions align with the desired outcome. Learning and thinking about who we ally for requires a kind of awareness that never truly ends. Though it may seem exhausting, child-like curiosity puts you in a perpetually humble but always eager space. Let's be okay with that thoughtful pause. Slow down and ask, "What don't I know? Who have I not heard from? Who has a different lived experience than me? Who can help me better understand this situation?" Then, follow that path. It opens the aperture to expand what inclusion really means. **IN**